



Jodi H. Epstein

Partner

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PRACTICE AREAS

Employee Benefits

- Qualified Retirement Plans
- Executive Compensation and Fringe Benefits
- Health and Welfare Plans

EDUCATION

Harvard Law School, 1993, J.D.,
cum laude

Stanford University, 1988, B.A.,
with distinction

CLERKSHIP(S)

Clerkship with the Honorable
Suzanne B. Conlon, Federal
District Court for the Northern
District of Illinois

BAR AND COURT ADMISSIONS

District of Columbia
Illinois

Jodi H. Epstein is a partner in Ivins, Phillips & Barker's Employee Benefits practice. She focuses on qualified plans, with particular expertise in integrations after acquisitions, setting up benefit platforms, and advising qualified plan committees regarding their fiduciary duties. Jodi's practice includes day-to-day compliance issues, such as assisting with implementation of new legislation and regulations, filing determination letter applications for qualified plans, trouble-shooting when glitches arise in plan operations, and helping qualified plan committees monitor plan investments and plan vendors. Her practice also includes the one-of-a-kind issues that can arise, usually in connection with M&A activity. Representative clients include General Electric and Comcast / NBCUniversal.

Jodi is well-versed in the complexity and challenges raised by large controlled groups. Clients appreciate Jodi's ability to manage projects involving multiple plan vendors, often on a tight timetable. Her client service and responsiveness are unsurpassed.

REPRESENTATIVE MATTERS

- Over the last decade, for a single multinational client, Jodi has helped merge more than 100 frozen defined contribution plans down into 2 plans. She helped develop a "Gatekeeper Process" for merger approvals, and she assists with the blackout notice and other participant communications.

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- Jodi advises Plan committees on a regular basis. She helps them navigate the complex rules involved with IRC and ERISA compliance, and helps them fulfill their ERISA fiduciary duties by monitoring vendors and overseeing investments.
- Jodi has drafted full-scale benefits programs following an acquisition or spinoff. Developing these new benefit platforms has included drafting new plan documents and SPDs, negotiating trustee and other vendor agreements, and crafting participant communications.

MEMBERSHIPS & AFFILIATIONS

D.C. Bar Tax Section, Employee Benefits Committee

American Bar Association

PUBLICATIONS

- June 7, 2016
Employee Benefits in Focus: The DOL Fiduciary Rule
Employee Benefits Insider
- May 25, 2016
Employee Benefits in Focus: Wellness Plans
Employee Benefits Insider

SPEECHES & PRESENTATIONS

- April 5, 2016, Defined Contribution Institutional Investment Association (DCIIA) Public Policy Forum: *Minimizing 401(k) Plan Litigation Risk* -- Panelist
- May 2015, DC Bar Employee Benefits Committee Program: Qualified Plan Corrections and Revenue Procedures 2015-27 and 2015-28 -- Panelist
- March 2015 Pension & Investments East Coast Defined Contribution Conference -- Moderator, Large Plans Roundtable
- February 9-10, 2015 Tax Executives Institute, Cincinnati-Columbus Chapter -- "*Protecting Yourself from ERISA Fiduciary Liability*" Presenters: Jodi H. Epstein and Benjamin L. Grosz
- March 2014 Pension & Investments East Coast Defined Contribution Conference -- Moderator, Large Plans Roundtable

NEWS

- August 16, 2016
Eleven Ivins Attorneys Named to 2017 Best Lawyers in America®
- May 26, 2015
Ivins Attorneys to Discuss Latest Developments & Risks for ERISA Fiduciaries