



**PHONE**

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**EMAIL**

[rzaklad@groom.com](mailto:rzaklad@groom.com)

**EDUCATION**

George Washington University Law School

JD, cum laude

Bates College

BA, cum laude

**ADMISSIONS**

District of Columbia

## J. Rose Zaklad

### Principal | Tax Practice Leader

Rosie Zaklad's practice involves the design, implementation and ongoing administration of retirement plans, including defined benefit, defined contribution, and tax-deferred annuity plans. She focuses on tax-qualified plan compliance issues, including Internal Revenue Service audits, rulings, and corrections.

Rosie has extensive experience assisting plan sponsors in navigating the plan termination process, including preparing employee communications, obtaining agency approvals, and responding to post-termination audits. She has also represented clients in responding to Department of Labor and Pension Benefit Guaranty Corporation inquiries, investigations, and audits.

While at Groom, Rosie has counseled clients on a wide range of retirement plan issues in connection with corporate transactions and spinoffs, including distributions, plan loans, company stock, record retention, and treatment of transferring employees. She has also advised on tax and ERISA issues in connection with the post-merger integration of retirement plans.

Rosie joined Groom's Tax group in 2010 from an international law firm where she advised clients on the ERISA, tax, and securities law aspects of employee benefits and executive compensation.

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**PROFESSIONAL AFFILIATIONS**

DC Bar, Tax Section

Chair, Distributions Subcommittee, Employee Benefits Committee, Tax Section, American Bar Association

## CLERKSHIPS

- Clerk to the Honorable Russell F. Canan, Superior Court of the District of Columbia

## HONORS & DISTINCTIONS

- Next Generation Partner, *The Legal 500 US*, Employee benefits, executive compensation and retirement plans: design (2020)
- Contributing Author, *ERISA: A Comprehensive Guide* (4th Edition)
- Managing Editor, *The George Washington International Law Review*

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I get to work with the brightest in my field,  
some of whom may have helped write the laws  
I'm tasked with interpreting.