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**EDUCATION**

University of Pennsylvania Law  
School

JD

University of California at Berkeley  
BS

**ADMISSIONS**

District of Columbia  
New York

## Jason Lee

### Principal

Jason Lee focuses on ERISA investment, fiduciary, and prohibited transaction issues, and regularly defends Department of Labor investigations of service providers.

Within the narrow ERISA fiduciary practice, Jason has extensive expertise. Jason works with both employers and service providers, advising on the investment of plan assets in collective vehicles, private investment funds, and managed accounts, and regularly negotiates investment management agreements and side letters. Jason has an in-depth knowledge of issues that arise in outsourced fiduciary solutions, including the allocation of responsibility and related risk among plan sponsors, outsourced fiduciaries, and underlying investment managers. Jason's broad practice also includes advising plan committees, investment consultants, fund managers, recordkeepers, trust companies, and stable value fund managers.

A keen sense of real world risk and practicality are central to Jason's practice. Jason is also known for his ability to find highly efficient ways to solve clients' problems. As an example, when a client needed to prepare thousands of excise tax returns, Jason did not simply advise the client on the legal rules. He tinkered with different file formats and Excel macro programming (Jason studied engineering and writes code) to find a way to automatically populate excise tax returns from data on an Excel file. Even after learning how to automate the tax returns, he and his colleagues went further by efficiently getting the matter resolved through filing a short application with the IRS in lieu of filing thousands of tax returns. This kind of thinking is deeply appreciated by his clients, and he applies the same rigor and client-focused approach on large prohibited transaction correction projects.

## **CLERKSHIP**

Law Clerk, The Honorable James E. Massey, U.S. Bankruptcy Court, Northern District of Georgia, Atlanta, GA

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I like doing legal analysis because it's analogous to solving math problems. Both require the application of rules to arrive at an answer.