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EDUCATION

William and Mary – Marshall Wythe
School of Law
JD, Order of the Coif
University of Maryland School of Law
BS

ADMISSIONS

District of Columbia

Mark Lofgren

Principal

Mark specializes in the design, governance, compliance, and operational issues for tax-qualified and nonqualified retirement plan arrangements.

He provides legal services to employers of all sizes, handling major plan redesign projects, plan governance and compliance reviews, plan correction issues and related IRS filings, retirement plan audit representation, participant communication materials, and benefit claim analysis. Mark has worked extensively with cash balance plan conversions and other defined benefit plan matters, including issues related to their regulation, operation, litigation, and termination. He has handled a variety of plan mergers and issues related to the retirement plan implications of corporate transactions.

Mark regularly interacts with IRS and Treasury officials both formally and informally on behalf of clients. He works with the IRS to resolve operational failures for qualified plans and to obtain rulings on various tax issues, and has worked on numerous formal comments to proposed Treasury regulations on a variety of tax-qualification requirements.

PROFESSIONAL AFFILIATIONS

Tax Section, American Bar Association

HONORS & DISTINCTIONS

- Hall of Fame, *The Legal 500 US*, Employee benefits, executive compensation and retirement plans: design (2019-2021)
- Hall of Fame, *The Legal 500 US*, Employee benefits, executive compensation and retirement plans: transactional (2020-2021)
- Leading Lawyer, *The Legal 500 US*, Employee Health and Retirement Plans (2017)

GROOM LAW GROUP

- Leading Lawyer, *The Legal 500 US*, Employee Benefits and Executive Compensation (2007-2016)
- Former Adjunct Professor, Georgetown University Law Center
- Managing Editor, William and Mary Administrative Law Review