

Events

ABA 2024 Midyear Tax Meeting

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Groom principals [Allison Itami](#), [David Levine](#), and [Rosie Zaklad](#) will present at the American Bar Association (“ABA”) 2024 Midyear Tax Meeting, which will kick off on January 18 in San Francisco, CA.

On January 19th, Levine will speak on the panel, “Employee Benefits Lifetime Income,” at 9:30 a.m. PT. The panel will focus on the steps necessary to be developed and utilized to facilitate the implementation of lifetime income products to be sufficient to enable the tools to be effective.

Zaklad will moderate the discussion, “Employee Benefits Plenary Session,” on January 19th at 4:15 p.m. PT, where speakers will provide updates on the latest guidance and developments affecting employee plans.

Itami will present, “DOL’s Fiduciary Rule Proposal – (2023 Version),” on January 20th at 10:30 a.m. PT, where panelists will discuss the Department of Labor’s (“DOL”) proposed investment advice definition, provide an overview of the proposed changes to the existing prohibited transaction exemptions, examine the potential impacts of the 2023 Proposed Rule, and discuss how the 2023 Proposed Rule might fare in the courts.

For more information, or to register for the event, [click here](#).