

News

Lifetime Income and Shared Risk Plan Designs Options

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Groom principals [David Levine](#) and [Rosie Zaklad](#) will participate in the American Bar Association (“ABA”) 2025 Midyear Tax Meeting to take place in Los Angeles, California February 19 – February 21, 2025.

Zaklad will co-moderate and Levine will serve as a panelist for the session, “Employee Benefits: Lifetime Income and Shared Risk Plan Design Options,” at 2:00 p.m. PT on Thursday, February 20. This discussion will explore evolving retirement plan structures, including strategies to enhance lifetime income solutions and shared risk designs. The presentation will offer insights into recent regulatory and legislative developments, as well as practical considerations for plan sponsors, fiduciaries, and service providers navigating these changes.

The ABA Midyear Tax Meeting brings together leading practitioners, policymakers, and academics to examine key developments in tax law, including critical issues in employee benefits and executive compensation.

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