

Retirement Services

Investment of Plan Assets

Groom attorneys combine the indispensable tools, resources, and comprehensive experience necessary to tactfully advise both public and private plans, as well as corporate plan sponsors, financial institutions, and multiemployer plan trustees in connection with the investment of plan assets.

From preparing standard form “best practices” investment management agreements to counseling on the ERISA, state law, tax, securities and banking law issues relating to the investment of retirement plan assets, Groom attorneys find strategic and efficient solutions for every client.

As highly skilled experts, Groom attorneys also have relevant knowledge in the valuation of alternative investments, employer securities and real property, annuities and life insurance in the plan market, and corporate-owned life insurance (COLI), bank-owned life insurance (BOLI), and trust-owned life insurance (TOLI).

SPECIALIZATIONS

- Annuities and Life Insurance in the Plan Market
- COLI/BOLI/TOLI
- Employer Securities and Real Property
- Valuation of Alternative Investments