Retirement Services

Plan Services & Providers

Plan sponsors, advisors, and service providers of all kinds come to Groom for expert counsel and representation on a wide range of retirement issues. After all, we've been developing our mastery of this area of the law since the passage of ERISA in 1974.

Our expertise is broad (single, multi-, and multiple employer plans, VEBAs, IRAs, HSAs, ESOPs) as well as deep, including, for example, matters related to employer securities and real property, in-kind contributions, self-directed accounts, reporting and disclosure, and more.

We counsel clients on day-to-day issues related to 401(k) and 403(b) plans, and provide assistance with structuring retirement plan products in a manner compliant with ERISA's fiduciary and prohibited transaction rules. Whatever a client requires in this legal and regulatory context, Groom is prepared to take it on and deliver results.

SPECIALIZATIONS

- 403(b) Plans
- ESOPs
- Employer Securities and Employer Real Property
- Financial Services for IRAs/HSAs
- Government Plans
- IRA Alternative Investments and Prohibited Transactions
- In-Kind Contributions
- Multiemployer/Taft-Hartley Plans
- Multiple Employer Plans
- Reporting and Disclosure
- Self-Directed IRA Issues for Family Offices/High Net Worth Clients
- Self-Directed and Managed Accounts
- Welfare Plans/VEBAs

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