



Retirement Plans

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ATTORNEYS

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Retirement plans are what we do. Our Benefits & Compensation team can help you with all aspects of pension and savings plan compliance, from plan design to plan termination and everything in between.

For more than 80 years, we have piloted employers through the complex rules governing their pension, 401(k), ESOP, money purchase, cash balance and PEP plans. A significant percentage of the Fortune 100 has relied on our Benefits & Compensation team to develop practical and creative solutions. We represent some of the nation's largest employers - with billions in plan assets - as well as many smaller and closely held businesses.

We represent employers - not recordkeepers or TPAs. Our clients include public and private companies, tax-exempt entities, and governmental organizations that sponsor benefit plans. Our singular focus on employers enables us to zealously represent your interests without conflicts; this is critical when negotiating service agreements on behalf of our clients.

Representative matters:

- *Audits and Corrections:* Auditing clients' plans for operational compliance, and assisting with the self-correction of operational "goofs," as well as formal IRS and DOL correction programs.
- *Lobbying:* Drafting the statutory language that became Code section 401(k), one of the most significant employee benefit changes since ERISA was passed in 1974.
- *Global Issues:* Consulting with foreign multinationals on the special problems arising from cross-border issues and employees transferring among different jurisdictions. Advising on Canadian and Puerto Rican plans.



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- *M&A*: Extensive advising on transactions (100+), many of which were multi-billion dollar deals. Negotiating agreements, supporting due diligence efforts, and drafting new plans to coordinate with existing plans. Advising on both the high-level plan design strategy, as well as the day-to-day vendor contracts and payroll conversions.
- *Fiduciary Liability*: Advising boards of directors and plan administrative committees on ways to minimize fiduciary liability. Counseling clients on prohibited transactions and applying for DOL exemptive relief.
- *Cash Balance Plans*: Establishing one of the first Fortune 100 cash balance plans. Our knowledge leaders in this area are frequently tapped for lobbying, litigation support and scholarly publications.

NEWS

- March 5, 2026
IPB Recognized in Best Law Firms 2026
- March 5, 2026
Twenty-One IPB Attorneys Recognized in Best Lawyers in America and Ones to Watch 2026 Editions
- March 2, 2026
Benjamin Grosz Quoted in PlanSponsor on Fiduciary Outsourcing
- October 2025
Mandatory Roth 401(k) and 403(b) Catch-Up Contributions Under the SECURE 2.0 Act
- June 5, 2025
Ivins Attorneys Recognized in Chambers USA 2025
- Alex Maged and Jodi Epstein Publish Article for Bloomberg Tax On Retirement Plan Overpayments After SECURE 2.0
- November 7, 2024
IPB Recognized in Best Law Firms 2025
- October 13, 2024
IPB Achieves Mansfield Certification Plus for the Third Time
- September 17, 2024
Alex Maged and Jodi Epstein publish an article in Bloomberg Tax Concerning 401k Plan Forfeitures
Bloomberg Tax
- August 20, 2024
Spencer Walters and Ben Grosz quoted in recent PlanSponsor article "Plan Distribution Options Can Help Participants Recover From Disasters Like Debby"



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- August 15, 2024
Twenty-Two IPB Attorneys Recognized in Best Lawyers in America and Ones to Watch 2025 Editions
- June 18, 2024
2024 Chambers USA Guide Recognizes Four IPB Partners Individually and the Tax and Benefits Practices
- June 14, 2024
Ben Grosz Quoted in PlanSponsor Magazine's Article "Creating Committees of Excellence"
PlanSponsor

PUBLICATIONS

- November 2025
The Forgotten Promise: Why PBGC Retirement Benefit Guarantees Should Continue After Pension Risk Transfer Transactions
PRT PBGC Guarantees
- February 2, 2025
Addressing Retirement Plan Overpayments After SECURE 2.0
Benefits Bullets
- February 14, 2025
Options for Asset Allocation Disclosure on a Defined Benefit Plans Annual Funding Notice
Benefits Bullets
- September 18, 2024
Protecting 401(k) Plans from Lawsuits Over Use of Forfeiture Funds
Benefits Bullets
- August 5, 2024
Selecting an Automatic Rollover Vendor for a Qualified Pension Plan
Benefits Bullets