



## Vendor Contracting & HR Outsourcing

### RELATED PRACTICES

Benefits & Compensation  
ERISA Litigation  
Executive Compensation  
Health & Welfare  
Mergers & Acquisitions  
Payroll Tax & Fringe Benefits  
Plan Investments  
Retirement Plans

### ATTORNEYS

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Steven H. Witmer

We have extensive experience supporting employers and fiduciaries as they outsource their employee benefit and other human resource services. We represent employers and plans. Unlike most of our competitors, we regularly decline to represent third-party administrators, trustees, recordkeepers, investment managers and advisers, and others. We do so in order to fully and aggressively represent employers and plans, free from the concern of compromising or taking positions that would be adverse to other client relationships. We take the negotiating or legal positions that other law firms can't or won't take because we don't attempt to juggle conflicting loyalties.

We are familiar with every phase of an outsourcing effort. We have supported or led innumerable RFP, sole sourcing, renewal, benchmarking and other efforts, helping our clients maximize their negotiating position. We have negotiated thousands of contracts, usually serving as the lead negotiator. Our attention to detail makes us the perfect drafters.

Our proficiency covers the universe of human resources and benefits contracts, including:

- administrative
- recordkeeper
- consulting
  
- trust
- investment management
- other

We know and have worked on efforts for:

- retirement



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- health and welfare
- payroll
  
- executive compensation
- wellness
- other human resource plans and programs

Clients appreciate that we bring both contracting and substantive benefits and employment expertise. We know the industry standard for each part of the contract, including, for example, current data security standards, typical liability limitations for specific types of services, etc. We also know how and where vendor contracts create prohibited transaction or other exposures for plan sponsors or fiduciaries and how to position a contract for Department of Labor or Internal Revenue Service purposes. We often know the vendors' template contracts as well as they do. We know the vendors' negotiating positions and strategies. We know their hot button items, when and where they are likely to meaningfully compromise, and when they won't.

### 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
- September 19, 2025  
Alex Maged and Percy Lee Publish Bloomberg Tax Article About Navigating State-by-State Drug Benefit Compliance Obligations  
*Bloomberg Tax*
- June 5, 2025  
Ivins Attorneys Recognized in Chambers USA 2025
- March 26, 2025  
Alex Maged and Percy Lee Publish Bloomberg Tax Article About Employee Requests for Late Enrollment in Health and Welfare Plans  
*Bloomberg Tax*



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- November 7, 2024  
IPB Recognized in Best Law Firms 2025
- October 13, 2024  
IPB Achieves Mansfield Certification Plus for the Third Time
- August 20, 2024  
Spencer Walters and Ben Grosz quoted in recent PlanSponsor article "Plan Distribution Options Can Help Participants Recover From Disasters Like Debby"
- 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

#### **PUBLICATIONS**

- March 26, 2025  
Late Health and Welfare Plan Enrollment Requests: Tax, ERISA, and Contractual Issues  
*Benefits Bullets*
- August 5, 2024  
Selecting an Automatic Rollover Vendor for a Qualified Pension Plan  
*Benefits Bullets*