



Benjamin L. Grosz

Partner

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PRACTICE AREAS

Benefits & Compensation

Retirement Plans

ERISA Litigation

Plan Investments

Vendor Contracting & HR
Outsourcing

Estate Planning

Exempt Organizations & Charitable
Giving

Gift & Estate Tax Planning

Privately Held Businesses

Tax

Arbitration & Litigation Support

Tax Controversies

Tax Planning & Advisory Services

EDUCATION

University of Virginia School of Law,
2011, J.D.

- Tazewell Taylor Memorial Scholarship
- Virginia Tax Review, Sr. Editor
- President of the Volunteer Income Tax Assistance *pro bono* project
- Nonprofit Clinic

Georgetown University, 2008, Exec.
Cert., Financial Planning

University of Virginia, 2003, B.A.,
magna cum laude

- Phi Beta Kappa

Prior to becoming a lawyer, Ben founded his own financial planning business. He now brings that entrepreneurial spirit and problem-solving mindset to each of his client matters. Whether working with an individual or a large corporation, Ben starts with an understanding of the client's goals and works to build a strategy to achieve them. Ben has a knack for seeing all sides of issues and anticipating follow-up questions, opportunities and risks. Clients tell Ben he can see around corners.

Ben advises clients on a broad range of employee benefits, federal tax, fiduciary, planning and controversy matters.

Ben's employee benefits practice consists of advising employers on a wide range of issues, including: ERISA; health, welfare and retirement plans; compliance with state and federal laws and regulations; and executive compensation. In particular, he regularly advises plan committees, providing legal updates and fiduciary training. He recently advised a Fortune 500 public company on a large (\$1 billion) annuity lift-out from a pension plan.

In addition, Ben has assisted clients in structuring settlements, asset sales, reorgs, and charitable donations. He has experience drafting estate planning documents, administering estates, and with probate matters. He also has advised boards of directors and the management of nonprofits. In addition to being a counselor to nonprofits, he has also served as an officer and/or director for tax-exempt organizations.



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- Echols Scholar

BAR AND COURT ADMISSIONS

District of Columbia

New Jersey

Virginia

U.S. Tax Court

Before law school, Ben was a business manager at Capital One, where he developed strategy and analysis for its credit card and banking businesses.

HONORS & AWARDS

Best Lawyers in America 2024 - 2026 (currently recognized for both Employee Benefits and Tax Law)

Washington, DC Super Lawyers 2022-present, "Rising Star" 2016-2021

Trailblazer Award, D.C. Bar Communities, 2022

Loeb Award for Pro Bono Excellence (Nominee/Finalist), WALA 2022

Legal 500 (recognized), 2021

Idealist of the Year, City Year DC 2008

Volunteer of the Year, Capital One 2006

MEMBERSHIPS & AFFILIATIONS

D.C. Bar Association, Tax Section

American Bar Association, Section of Taxation, Business Law

- Vice-Chair of Tax Section's Closely-Held Business Committee

Virginia Bar Association

SPEECHES & PRESENTATIONS

- "Creating Committees of Excellence," PlanSponsor National Conference, June 7, 2024. Panelist: Ben Grosz.
- "Q&A Under the Corporate Transparency Act for Closely Held Businesses," ABA Tax May Meeting, May 3, 2024. Panelist: Ben Grosz.



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- "Advanced Plan Design: Illuminating the Unseen," Institutional Investor RPA Summit (Southeast), February 7, 2024. Panelist: Ben Grosz.
- "The Current Status of Non-Competition, Non-Solicitation and Non-Disclosure Agreements for Closely Held Businesses and Professional Practices," ABA Tax Midyear Meeting, January 19, 2024. Moderator: Ben Grosz.
- "Understanding Plan Sponsors' Fiduciary Duties," Fiduciary Forum at the PlanSponsor National Conference, June 21, 2023. Panelist: Ben Grosz.
- "Equity Incentive Compensation for Closely Held Businesses," ABA Tax May Meeting, May 5, 2023. Panelist: Ben Grosz.
- "ESG Investing: Where Do We Go From Here?" Pensions & Investments ESG Investing Conference, April 12, 2023. Panelist: Ben Grosz.
- "Employee Retention Tax Credit (ERTC) for Closely Held Businesses," ABA Tax May Meeting, May 14, 2022. Moderator: Ben Grosz.
- "A Primer on Employee Benefits and Executive Compensation," ABA Tax May Meeting, May 12, 2022. Panelist: Ben Grosz.
- "Lessons Learned From Litigation," PlanSponsor National Conference, June 9, 2022. Panelist: Ben Grosz.
- "Considering ESG Factors in Investment Selection," Fiduciary Forum at the PlanSponsor National Conference, June 8, 2022. Panelist: Ben Grosz.
- "*The Art of the Retainer Letter*," D.C. Bar, virtual presentation, May 19, 2021. Presenter: Benjamin L. Grosz
- "*Best of*" PlanSponsor National Conference, *Legislative & Regulatory Update*, November 4, 2020. Panelist: Benjamin L. Grosz and Jodi H. Epstein
- "*Employee Benefits in Merger & Acquisitions*," Tax Executives Institute, Los Angeles Chapter, November 3, 2017. Presenters: Steven H. Witmer, Benjamin L. Grosz, and Robin M. Solomon.
- "*Executive Compensation: Selected Topics*," Tax Executives Institute, Los Angeles Chapter, November 3, 2017. Presenters: Ben Grosz and Robin Solomon
- "*EB Fundamentals for Tax Executives*," Tax Executives Institute, Los Angeles Chapter, November 3, 2017. Presenters: Benjamin L. Grosz, Robin M. Solomon, and Steven H. Witmer.
- "*Ask the Expert*" - *Retirement Plans* panel, 2017 Maryland Health Care & Retirement Plan Summit, Baltimore, MD - Oct. 24, 2017.
- "*Ask the Lawyers*" - *2017 Employee Benefits Update*, Washington Area Compensation & Benefits Association, Fairfax, VA - September 21, 2017.



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- *Executive Compensation and Employment Tax* update, N. Florida Compensation & Benefits Association, Jacksonville, FL - May 25, 2017. Presenters: Ben Grosz and Robin Solomon
- *Lessons From Younger Rainmakers*, DC Bar Law Practice Management Section, Washington, DC - March 16, 2017. Panelist: Benjamin L. Grosz
- *PlanSponsor, Best of PSNC, Lessons Learned from Litigation*, New York, NY - December 1, 2016. Panelist: Benjamin L. Grosz
- D.C. Bar, *LinkedIn for Lawyers*, Washington, DC - November 30, 2016. Moderator: Benjamin L. Grosz
- "Evolving Investment Fiduciary Best Practices: Lessons from Recent 401(k)/403(b) Litigation and the New DOL Rules," Platinum Retirement Advisor Call Series (Columbia Threadneedle), Teleconference, November 21, 2016
- American Bar Association, "Business Law Basics" Webinar Series - Employee Benefits, April 28, 2016. Chair/Moderator: Benjamin L. Grosz; Panelist: Steven H. Witmer
- D.C. Bar, *LinkedIn for Lawyers*, Washington, DC - November 12, 2015. Moderator: Benjamin L. Grosz
- "Employee Benefit Basics for Business Attorneys," American Bar Association, San Francisco, CA, April 17, 2015. Chair/Moderator: Benjamin L. Grosz; Panelist: Steven H. Witmer
- "Protecting Yourself from ERISA Fiduciary Liability," Tax Executives Institute, Cincinnati-Columbus Chapter, February 9-10, 2015. Presenters: Jodi H. Epstein and Benjamin L. Grosz
- "Back to Basics: Powers of Appointment," D.C. Bar Taxation Section, Estate Planning Committee, January 22, 2013. Presenter: Benjamin L. Grosz

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
- May 30, 2025
Thirteen IPB Attorneys Included in Super Lawyers 2025



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- April 8, 2025
Ben Grosz quoted in recent PlanSponsor article "More Fiduciary Basics"
- April 1, 2025
Ben Grosz quoted in recent PlanSponsor article "Fiduciary Basics for New Plan Sponsors"
- August 20, 2024
Spencer Walters and Ben Grosz quoted in recent PlanSponsor article "Plan Distribution Options Can Help Participants Recover From Disasters Like Debby"
- June 14, 2024
Ben Grosz Quoted in PlanSponsor Magazine's Article "Creating Committees of Excellence"
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