THE AMERICAN COLLEGE OF EMPLOYEE BENEFITS COUNSEL

2024

Twenty-Fourth Annual

Induction Ceremony and Dinner

Saturday, September 14, 2024

Honoring the 2024 Fellows
Celebrating the 50th Anniversary of ERISA

National Portrait Gallery & Smithsonian

American Art Museum

The Robert & Arlene Kogod Courtyard

Washington, DC

Dedicated to Henry Rose

Surrounded by his family, on Thursday, November 2, 2023, Henry Rose of Chevy Chase, MD, died peacefully after a short illness. Henry was born on March 28,1927, in Olean, NY, and his family moved to Buffalo in 1934. He served in the U.S. Navy from 1945 through 1946, and after his discharge, attended the University of Buffalo and the University of Buffalo School of Law, graduating in 1951. In law school, he was a founder and editor of the Buffalo Law Review.

After law school, Henry taught law at Northwestern University, the University of Toledo, and the University of Buffalo. He was a Sterling Fellow at Yale and received an LLM. His interest in labor law led him to the National Labor Relations Board and later, the U.S. Department of Labor. In 1969, he became the Associate Solicitor of Labor for Legislation where he was the principal drafter of, among other laws, the Employee Retirement Income Security Act of 1974 (ERISA), which regulates pension and health benefits and created the Pension Benefit Guaranty Corporation (PBGC).

He was appointed as the PBGC's first General Counsel, serving from 1974-1984. As PBGC's General Counsel, Henry argued and won the first case under ERISA before the U.S. Supreme Court, Nachman Corp. v. PBGC (1980). After leaving the PBGC, Henry had a successful career in private practice where he had the opportunity to argue and win a second important ERISA case before the Supreme Court, Demisay v. Local 144 Nursing Home Pension Fund (1993). Henry was always extremely grateful to his mentors in law, and he paid it forward by mentoring many young lawyers during his time in government. He was a devoted teacher, parent, grandparent, and friend to so many.

The Board of Governors
of the
AMERICAN COLLEGE
of
EMPLOYEE BENEFITS COUNSEL

Welcomes You

to its

Twenty-Fourth Annual Induction Ceremony and Dinner

Honoring

The 2024 Fellows

Saturday, September 14, 2024

National Portrait Gallery & Smithsonian
American Art Museum
The Robert & Arlene Kogod Courtyard
Washington, DC

Program for the Evening

6:00 Cocktail Reception

8:00 Dinner and Business Meeting

8:40 Welcome
Joni L. Andrioff, President

8:41 The Honorable Lisa M. Gomez, Assistant Secretary, Employee Benefits Security Administration (EBSA), U.S. Department of Labor

8:47 Brief Business Meeting
Susan Wetzel, Secretary's Report
Bret Hamlin, Treasurer's Report
Frank Palmieri, Nominating Committee's Report

8:55 Simplification Award
Norman Stein, Co-Chair, Simplification Award Committee

- J. Mark Iwry, Washington, DC, for *Simplifying Plan Participation By Part-Time Employees*
- Raechel Parolisi, Plano, TX, for *Simplifying "Spouse": Making QDROs Accessible for Domestic Partners*

9:00 Writing Competition Awards
Frances King Quick, Chair, Writing Competition Committee

- Brian J. Dougherty Memorial Award: Alexander (Alec) Sewall, University of Cincinnati College of Law for *Is a Normal Transaction a Prohibited Transaction? Prohibited Service Transactions in Retirement Plan Administration: Navigating Circuit Splits and Policy under ERISA*
- Sidney M. Perlstadt Memorial Award: Nathan Hensley, University of Chicago School of Law for *Pleading Prohibited Practices: Clarifying the Pleading Standard for Prohibited-Transactions Complaints Under ERISA § 406*
- Honorable Mention: *The Uncertain Future of ERISA Section 502(a)(2) Arbitration* (Kelsey Roberts, 2024 graduate, University of Chicago)
- Honorable Mention: *An Ongoing Mental Health Epidemic: The Need for Stronger Mental Health Parity Laws in the United States* (Halim Nurdin, Drexel University, 2024 graduate)

- Honorable Mention: *The "Meaningful Benchmark" Standard as Applied to ERISA's Duty of Prudence* (Kasey Lee, 2024 graduate, Fordham University)

9:05 Moot Court Report
Phyllis C. Borzi, Ellen (Nell) A. Hennessy Moot Court Competition

- Best Team: Emily Marquez, Kayla Borowitz, and Jenelle Scillia, Drexel University, Thomas R. Kline School of Law
- Best Brief: Winnie Zhong and Xinyu Qiang, George Washington University Law School
- Best Oral Advocate: Winnie Zhong, George Washington University Law School

9:15 New Fellow Induction Ceremony
Howard Shapiro, Chair Nomination Committee

9:45 Closing Remarks
Joni L. Andrioff, President

9:50-11:00 Dessert Buffet and After-Dinner Drinks

2024 Fellows

Jacquelyn M. Abbott

William M. (Bill) Evans

Joseph C. Faucher

Katherine A. Hesse

Eric Keller

Brandon Long

Heidi A. Lyon

Yolanda D. Montgomery

Lori Oliphant

In Memory of

Gregory K. Brown

Henry G. Rose

William A. Schmidt

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MEET THE NEW FELLOWS

Read about them on the following pages

JACQUELYN M. ABBOTT

Jacquelyn "Jacquie" Meng Abbott is of counsel in the Houston office of Vorys, Sater, Seymour and Pease LLP, and a member of the firm's labor and employment group. Her practice focuses on employee benefits and related federal compensation tax matters, advising on labor negotiations, pension and fringe benefit plan mergers and acquisitions. She also provides legal advice to human resource and corporate financial services leaders on employee benefits and employment tax laws including MHPAEA, CAA, ERISA, ADEA, ADA, GINA, FMLA, COBRA, ACA, HIPAA and other applicable federal laws.

Jacquie was included in the 2024 and 2025 editions of the Best Lawyers in America list for Employee Benefits (ERISA) Law. She has been a Fellow of the American Bar Foundation since 2021. During 2007, she received the Pro Bono Lawyer of The Year award from the Houston Volunteer Lawyers Program.

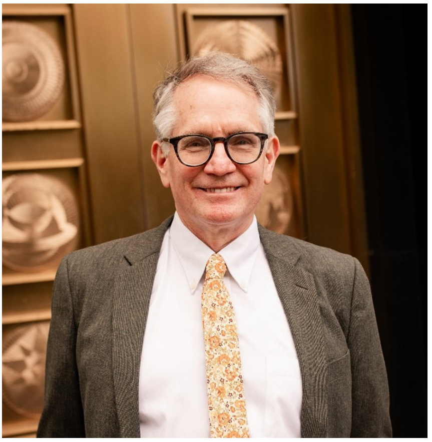
She has nearly 50 years of experience in the employee benefits and labor arena. Prior to joining Vorys, she served as the supervising tax counsel for the ExxonMobil Corporation, responsible for legal compliance of medical, dental, life insurance and disability plans. She also served as in-house counsel for the Lincoln National Corporation and Lincoln National Life Insurance Company for more than two decades.

Jacquie is a frequent speaker on recent developments and is currently vice-chair of the American Bar Association's Section of Real Property, Trust and Estate Law, Welfare Benefit Plans Committee.

She has previously served as chair of the ERISA Industry Committee (ERIC) health policy committee (2008-2012), as well as the co-chair for American Bar Association Section of Taxation, Subcommittee on Welfare Plan and EEOC, FMLA and Leave Issues (2019-2020). She has been a member for the American Council of Life Insurance, Risk Classification Committee (1988-1990); the Indiana State Bar Association Board of Governors (1991-1993); the Task Force on Fiduciary Matters (1980-1996); the Joint Committee with Health Insurance Association of America on Task Force on the Application of ERISA to Welfare Benefit Plans (1994-1996); and the Task Force working on DOL general account regulations (1980-1999).

She has presented and has been published on a number of employee benefits related topics including: what should the ERISA qualifications of an annuity purchased by an employer in the face of the Executive Life insolvency; ERISA: Ten Years After, “Plan Asset Reversions;” and developments in the life insurance industry.

Jacquie has three children, nine grandchildren and one great-grandchild, and she appreciates the support she has received from all – including her husband, Jim – across her career!



WILLIAM M. (BILL) EVANS

Since 2007, William M. (Bill) Evans has been an attorney-advisor in the Benefits Tax Counsel's Office, Office of Tax Policy, U.S. Department of the Treasury. His responsibilities have included: developing, drafting, and explaining IRS and Treasury Department guidance with respect to retirement-related tax rules; developing and implementing Treasury Department legislative and administrative initiatives to enhance Americans' retirement security; and coordinating Treasury Department policy regarding retirement security and retirement-related tax rules with other government stakeholders, including the U.S. Congress, the DOL, the PBGC, and the Government Accountability Office. His guidance projects have included: simplifying benefit rollover procedures and waivers for late rollovers; facilitating development of hybrid plan designs; broadening retirement system coverage by facilitating automatic enrollment; facilitating plan designs that address longevity risk by providing lifetime income; simplifying plan administration by facilitating mid-year amendments to safe harbor 401(k) plans; updating IRS correction program rules to expand self-correction eligibility and provide safe harbor corrections taking into account funding status and ongoing contributions; developing the myRA program, a starter Roth IRA program intended to expand retirement system coverage; addressing missing participant issues; permitting remote witnessing of spousal consents; and providing relief from the unified plan rule for multiple employer plans. Bill has been a frequent presenter and lecturer at ABA tax section, JCEB, DC Bar Association, and other employee benefits association conferences and events.

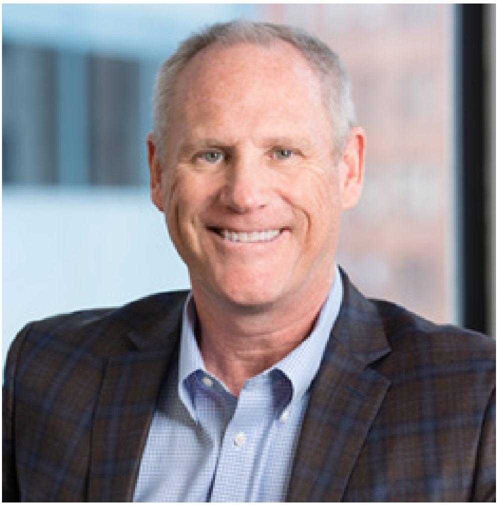
Before joining the Treasury Department, Bill worked for 15 years as an associate and principal employee-benefits attorney for the Groom Law Group, a Washington, DC law firm specializing in employee benefits. His work included providing advice regarding the impact of corporate acquisitions and dispositions on defined benefit and defined contribution qualified plans, conducting compliance reviews and filing and negotiating proposed corrections with the IRS under the EPCRS program, and implementing cash balance defined benefit formula designs. Previously, he worked as an employee benefits, litigation, and corporate attorney at Robinson, Bradshaw & Hinson, a Charlotte, NC law firm.

From 2005 through 2015, Bill also served as an adjunct professor at the

Georgetown University Law Center. There, he co-taught the Retirement Plan Design & Taxation course, a required course for the Law Center's Employee Benefits Law Certificate. Areas covered included qualified plan distribution timing rules, taxation of annuity and non-annuity distributions, eligible rollover distributions, participant and spousal consent, cash-out distributions, plan loans and hardships, required minimum distributions, tax withholding, IRAs, and SIMPLE plans.

Bill earned his juris doctorate degree from the University of Virginia School of Law, his bachelor's degree from Brigham Young University (Economics major, English minor; summa cum laude; Presidential Scholar), and his associate's degree from Ricks College (Business Management major; highest honors; National Merit Scholarship finalist). His outside-of-work interests include keeping tabs on his five children and growing numbers of grandchildren, road biking, playing guitar, singing choral music, writing poetry, cartooning, gardening, Indonesian culture, youth sports, and teaching and ministering in his congregation of The Church of Jesus Christ of Latter-day Saints.

Bill is grateful for the opportunity to have rubbed shoulders with and learned from many of the American College of Employee Benefits Counsel active and former Fellows. He hopes to use ACEBC relationships and programs as a springboard to continue developing and pursuing public awareness and understanding of the law of employee benefits.



JOSEPH C. FAUCHER

Joseph C. Faucher is a Director in the Los Angeles office of the employee benefits law firm Trucker Huss, APC. He was admitted to the State Bar of California in 1988 and has focused his practice on ERISA and employee benefits litigation since 1990. He has been admitted to practice before the United States District Courts for the Southern, Central, Eastern and Northern Districts of California, the Ninth Circuit Court of Appeals and the Bar of the United States Supreme Court. He has been recognized in the areas of ERISA Litigation and Employee Benefits Law by Best Lawyers® for 2024 and 2025. Joe is also a volunteer mediator for the United States District Court for the Central District of California Mediation Panel.

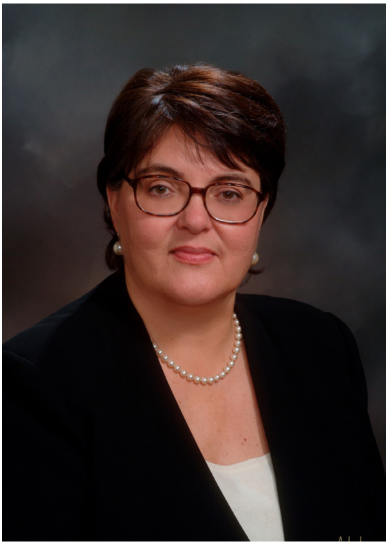
Joe has handled a wide range of litigation matters involving virtually every manner of employee benefit plan, including privately sponsored retirement plans, health and welfare benefit plans, employee stock ownership plans ("ESOPs"), multiemployer pension plans and retirement plans and welfare benefit plans sponsored by governmental entities. He has represented defendants in individual claims and class action litigation matters, has represented trustees in multiemployer plan deadlock arbitration proceedings, and has represented trustees and other fiduciaries in connection with investigations by the United States Department of Labor.

In recent years, Joe was an active part of a team that successfully defended the State of California's "CalSavers" individual retirement account payroll deferral program. That case involved a challenge by a taxpayer rights organization arguing that the law enacting the CalSavers program was preempted by ERISA. Since obtaining a favorable result before the United States Ninth Circuit Court of Appeals, CalSavers assets under management – which will benefit Californians who would otherwise lack retirement savings because their employers do not sponsor retirement plans - are approaching $1 billion.

Joe also maintains an active sub-specialty practice in litigation involving ESOPs, frequently representing independent ESOP trustees, committees, and other fiduciaries, most often in cases challenging ESOPs' acquisition of company stock.

Joe is a prolific writer regarding ERISA and employee benefits topics, having been a regular contributor for the Journal of Pension Benefits for over 25 years. For several years running he has been a chapter editor for the employee benefits treatise “ERISA – A Comprehensive Guide.” Joe is also a sought-after speaker regarding ESOP litigation, fiduciary litigation trends and service provider liability. He recently acted as Chair of the American Bar Association Tort Trial & Insurance Practice Section Employee Benefits Committee. He has been regularly recognized since 2009 as a Southern California “Super Lawyer.”

Joe is a 1985 graduate of the University of Iowa (Go Hawks!) and received his law degree from the University of California, King Hall School of Law in 1988.



KATHERINE A. HESSE

Katherine Hesse is a partner in the law firm of Murphy, Hesse, Toomey & Lehane, LLP, in Boston, Massachusetts where she has been practicing since 1977, primarily in labor and employment, employee benefits law, with a concentration on fiduciary, trust, health, retirement and ERISA law and related litigation. She has served as counsel to Fortune 500 Companies, emerging businesses, government, and tax-exempt organizations including hospitals, colleges and private and public retirement and health and welfare trust funds including multi-employer Taft-Hartley plans, multiple employer trusts, church and governmental plans. She advises clients on employment, benefits and trust issues including related tax matters and has litigated employment and benefits cases before the state and federal trial and appellate courts, administrative agencies, and arbitrators. She is experienced in all forms of alternative dispute resolution, including mediation, and various forms of arbitration as well as serving as an expert witness and professional trustee.

Katherine heads the team of attorneys that was named the only firm in New England and one of only 11 in the United States to the special ERISA fiduciary litigation panel for one of the world's largest insurance companies. She and her team successfully concluded a $110 million legal battle over the surplus assets of the former Bank of New England's pension plan. She is the author of the authoritative chapter on the Massachusetts Public Employee Retirement System published in A Judicial Guide to Labor and Employment Law – a publication relied upon by the state's judges as a definitive reference guide to this area of law.

Katherine received her B.A. degree from Smith College and her J.D. degree from the Boston University School of Law. She is admitted to the Bars of the Commonwealth of Massachusetts, the District of Columbia, the United States District Court for the District of Massachusetts, the United States Court of Appeals for the First Circuit and the Supreme Court of the United States.

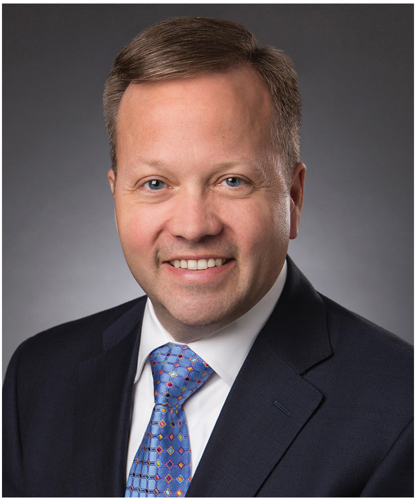
Katherine serves as Chair of the Government Liaison Committee of the International Foundation of Employee Benefit Plans has served for several years as one of its nine Advisory Directors. She also served as Chair of its Attorneys Committee and its Financial Review Committee She was part of the inaugural class of Certified Employee Benefits Specialists, served as president of the International Society of

Certified Employee Benefit Specialists, and co-founded the Greater Boston Chapter. She was inducted into the International Society of Certified Employee Benefit Specialists Hall of Fame in its 2018 inaugural year, one of only three recipients in the country, and was winner of the 1997 Cushing-Gavin Award for excellence in providing legal counsel.

Katherine sits on the editorial board of Benefits Quarterly, a journal for health and retirement benefits professionals, and has authored/edited its Legal Update for many years. She also served on the Board of Wolters Kluwer Law and Business Pension Editorial Advisory Board, and formerly wrote the legal column for Aspen Publishers, Inc., Managing Employee Health Benefits. She has taught at Northeastern University and speaks frequently on employee benefits and fiduciary issues across the country. She also developed materials for and provided training to employees of DOL's EBSA and the PBGC.

Katherine has held leadership positions in the Boston Bar Association (Chair, Labor & Employment Law Section), the Massachusetts Bar Association (member of Labor & Employment Law Section, Chair, Dispute Resolution Section), the Massachusetts Bar Foundation (Trustee and Life Fellow) and Massachusetts Continuing Legal Education (Board member and officer) and is a long-time member of the American Bar Association and the Employee Benefits Committee of the Labor and Employment Section. She served on boards including Harvard Pilgrim Health Care and Quincy Mutual Life Insurance Company and currently serves on the advisory board of Eastern Bank.

Katherine has been active in supporting women's causes and served as President of the Alliance for Women's Business and Professional Organizations. Her charitable endeavors include having served as Board Chair for St. Mary's Center for Women & Children, St. Coletta's/Cardinal Cushing School and Training Center, and St. John of God Hospital. She is a recipient of the Patriots Trail Girl Scouts Leading Women Award and the Woodward School Woman of Distinction Award. She is a loving sister, aunt, godmother, and now doting great-aunt for one year old Virginia and three-month-old Carter. She loves traveling, reading, and going to theatre in NYC with her pals from Junior Year Abroad. Her next trip is to Thailand on a tour to visit one of her favorite charities, Friends of Thai Daughters, to attend the ribbon cutting at its new facility at Jasmine Farm. Friends of Thai Daughters provides education, safe shelter and emotional support to girls at risk of being trafficked in Northern Thailand, empowering these vulnerable girls to become valued Daughters, educated women, and independent adults.



ERIC KELLER

Eric Keller is a partner in the Tax Department of Paul Hastings, and is a member of the firm's Executive Compensation, Benefits, and ERISA practice group and the Employment Law practice group. Mr. Keller is rankedby Chambers USA as one of the top employee benefits and executive compensation lawyers in the District of Columba. According to Chambers, he is "praised [by clients] for being 'very good at identifying risk and then giving very pragmatic advice' and works within all areas of benefits and compensation." Chambers noted one client advised said he "treats every matter that I send to him - big or small - as if it is the most important thing he is working on." Mr. Keller is also recommended by Best Lawyers in America in employee benefits and ranked by Legal 500 in executive compensation and employee benefits. He is an adjunct professor at Georgetown Law School, teaching classes on executive compensation.

For over 20 years, Mr. Keller has devoted his practice to executive compensation, employee benefits, and workforce restructuring matters. A substantial portion of his practice is devoted to advising clients on labor, employment, and employee benefits matters in connection with domestic and cross-border mergers, acquisitions, divestitures, and other business transactions by conducting due diligence, negotiating, and preparing contract provisions, addressing transitional issues, and developing strategies to minimize financial expense and taxation.

Mr. Keller also maintains a broad-based practice representing domestic and international clients on executive compensation, tax-qualified retirement plans, health and welfare plans, and workforce restructuring matters. He advises clients regarding tax, employment, fiduciary, governance, securities, and litigation issues. Mr. Keller also designs and prepares plan documents and participant communications, negotiates service-provider contracts, and assists clients in developing and operating efficient and prudent plan administration practices.

In the executive compensation area of his practice, Mr. Keller designs and implements employment agreements and executive compensation programs, including short, mid, and long-term incentives, equity-based compensation, retention, severance and change in control arrangements, deferred compensation, and supplemental retirement compensation.

In the tax-qualified retirement plan area of his practice, Mr. Keller advises investment committees and other plan fiduciaries on how to reduce their risk of fiduciary liability for plan investments and fees and represents sponsors of employee benefit plans in voluntary compliance programs maintained by the Internal Revenue Service and the Department of Labor.

In the employee welfare benefit plan area of his practice, Mr. Keller advises clients on the Affordable Care Act and HIPAA privacy compliance for group health plans, as well as Health Reimbursement Accounts, Health Savings Accounts, and other consumer-driven health plan designs. In addition, he represents plan fiduciaries in administrative claim disputes with participants and contractual disputes with service providers.

Finally, in the workforce restructuring area of his practice, Mr. Keller designs and implements early retirement incentives and reduction in force programs and advises clients on the WARN Act, state WARN Act analogs, the Age Discrimination in Employment Act, and other related issues.

Education

- New York University School of Law, LL.M., 1996
- Capital University Law School, J.D. 1995 (magna cum laude; editor-in-chief, Capital University Law Review)
- Ohio University, B.B.A., 1992 (cum laude)
- Served as law clerk to the Honorable Maurice B. Foley, United States Tax Court

BRANDON LONG

Almost 30 years ago Brandon Long started in the mail room of a large law firm and ultimately worked for many years as a paralegal while going to college and law school at night. He practiced with large national and international law firms in Dallas and Washington, D.C. before returning to his hometown and joining McAfee & Taft, Oklahoma's largest law firm.

Brandon is an experienced, AV Preeminent-rated employee benefits attorney. He represents regional and national clients with thousands of employees, including publicly traded corporations, governmental entities, and Indian tribal governments.

Brandon currently serves as a shareholder-elected member of McAfee & Taft's seven-member Board of Directors. Prior to being elected to the firm's Board, he served for many years as the leader of the firm's Employee Benefits and Executive Compensation Group.

His achievements have earned him inclusion in the Chambers USA Guide to America's Leading Lawyers for Business, Oklahoma Super Lawyers, and The Best Lawyers in America (employee benefits/ERISA law). Brandon was selected by Best Lawyers as "Oklahoma City Employee Benefits/ERISA Lawyer of the Year" for 2021 and 2025, honors given to a single lawyer in each legal specialty in each market.

Brandon is a frequent author and speaker on employee benefits topics nationwide and has played key advisory and leadership roles in a number of leading industry organizations, including the SouthWest Benefits Association (past president), the Employee Benefits Institute of Kansas City (member, steering committee), the American Bar Association (co-chair, Employee Benefits Subcommittee on Self Correction and Administrative Practices), , and the Oklahoma Board on Legislative Compensation (prior, appointed member). His passion for advocating for employer-sponsors of health plans also led him to co-found the Oklahoma Employers Healthcare Alliance, an employer coalition committed to educating and empowering employers and their employees to make informed healthcare-related decisions.

Brandon's practice is focused on matters involving qualified retirement plans, health and welfare plans, and executive compensation. He routinely advises boards and board committees regarding fiduciary and investment issues and the compliance aspects of new or evolving laws. A portion of his practice is also devoted to ERISA litigation, including the defense of employers in benefits litigation and advocating for employers and employer plans in appellate litigation. Brandon also provides comments to legislators and regulators on what the law should be, and has submitted amicus briefs to courts encouraging decisions that help employer plans and their covered participants.

Brandon holds a master of laws in taxation from the Villanova University School of Law.

HEIDI A. LYON

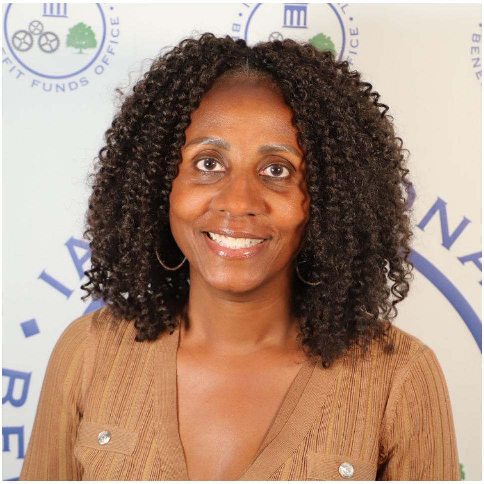
Heidi Lyon is a partner in the Grand Rapids office of Warner Norcross + Judd LLP. For over 20 years, Heidi has centered her practice on a wide range of retirement plan matters (including 401(k), 403(b), 457, defined benefit, cash balance and profit-sharing retirement plans) and executive compensation.

Heidi first gained experience in the employee benefits area through an internship with the U.S. Department of Labor's Office of the Solicitor and later entered private practice with a focus on employee benefits. Heidi serves a diverse client base, including privately held and publicly traded global, national and local employers of all sizes, plan fiduciary boards and committees, colleges and universities, hospitals, nonprofits, governmental entities and professional services firms.

As a lawyer who's passionate about using her technical knowledge to help clients in achieving their goals and promote employee benefits, Heidi advises on designing, operating and maintaining compliant employee benefit plans that attract, retain and engage a talented and diverse workforce at a manageable cost. Heidi assists with understanding and navigating the complex legal framework that applies to retirement plans as well as industry trends. She also works closely with plan fiduciaries to interpret plans, understand their responsibilities, assess risk, develop prudent processes, correct errors, engage and monitor service providers, and provide audit and investigation support.

On the deferred compensation side of her practice, Heidi advises on designing and maintaining deferred compensation plans, bonus programs, SERPs, incentive plans, phantom equity and employment agreements to attract and retain the finest business leaders and employees in a tax-efficient manner. Her work enables clients to reward executives and employees for delivering their best performance and bolstering the overall success of the workforce and organization.

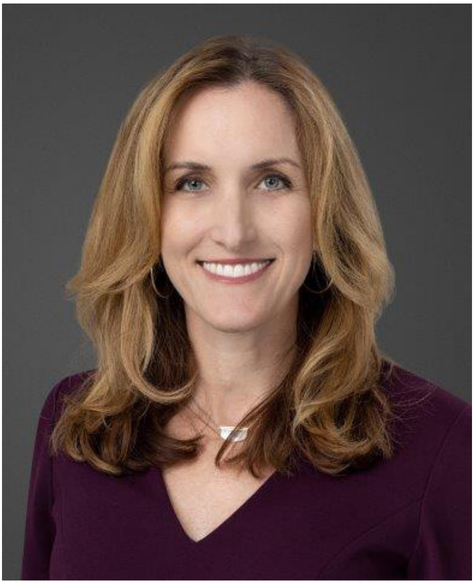
Heidi is actively involved in organizations dedicated to discussion, education and advancement of employee benefits, legal developments, legislation, regulatory guidance and compliance, including the American Bar Association (Employee Benefits Committee, the IRS TE/GE Council (Great Lakes and the National Joint Council), and the American Society of Pension Professionals & Actuaries (ASPPA). She also is a regular speaker and writer on employee benefits legal developments, best practices, compliance and fiduciary training. Heidi routinely presents at programs designed to educate and update human resources, legal and accounting professionals on employee benefits, has served on a team of Adjunct Faculty Members teaching a course on employee benefits at Grand Valley State University, and co-authors a chapter on QDROs for the Institute of Continuing Legal Education in Michigan.



YOLANDA D. MONTGOMERY

Yolanda D. Montgomery is the Executive Director of the IAM National Benefit Funds. Ms. Montgomery oversees the administrative and operational functions of the National Pension Fund, the Benefit Trust Fund and the National 401(k) Fund, including all labor and employment matters. Ms. Montgomery is also an Arbitrator and Mediator with the American Arbitration Association where she handles employment matters. Prior to joining IAM National Benefit Funds, Ms. Montgomery was the Assistant Executive Director and Counsel of the SEIU Benefit Funds where she oversaw the administrative and operational functions of the SEIU Benefit Funds. Ms. Montgomery also handled all employment related issues and led all labor negotiations. Ms. Montgomery was an Attorney at Proskauer in New Orleans where her practice focused on ERISA Substantive plan work, ERISA Litigation and Labor and Employment.

Ms. Montgomery is actively involved in various bar association activities and holds several committee positions. Ms. Montgomery is also a frequent lecturer on ERISA and Labor and Employment topics. Ms. Montgomery graduated from Howard University with a B.S. in Psychology. Ms. Montgomery received her J.D. from Texas Southern University School of Law, and her Master of Law in Taxation from Temple University, James Beasley School of Law.



LORI OLIPHANT

Lori Oliphant is the Managing Member of the Dallas office at Steptoe & Johnson PLLC and focuses her practice on employee benefits and compensation matters and has extensive and in-depth experience related to these areas. She is well-versed in Employee Retirement Income Security Act (ERISA) issues and tax implications under the Internal Revenue Code of these arrangements and helps companies navigate through and comply with the regulatory requirements of ERISA and the Code. Lori assists clients with the implementation, administration, and termination of benefit programs, including tax-qualified retirement plans, as well as health and welfare plans.

Lori assists clients in the structuring and preparation of equity incentive arrangements, deferred compensation arrangements, nonqualified plans, and related executive compensation programs. She works with a broad and diverse group of clients including Fortune 500 companies, privately-held companies, governmental entities, tax-exempt entities, private investment funds, real estate funds, and investment managers.

Lori's clients rely on her knowledge, experience, and commitment to providing excellent service to work through sometimes complex employee benefits and compensation matters. She represents clients before various governmental entities, including the Internal Revenue Service (IRS) and the Employee Benefits Security Administration (EBSA), as well as the Pension Benefit Guaranty Corporation (PBGC).

Lori is a board member of the American Bar Association (ABA) Joint Council on Employee Benefits. In addition, Lori is a board member for the TE/GE Council. She also is a former co-chair for the ABA Employee Plans Committee, a former chair for the ABA Fiduciary Responsibility Administration and Litigation Subcommittee, a former board member of the Southwest Benefits Association and a former board member of the National Association of Stock Plan Professionals, Dallas Chapter. She has also been recognized as The Best Lawyers in America®, Employee Benefits (ERISA) Law since 2019.

Lori earned her J.D. the University of Florida Fredric G. Levin College of Law, her LL.M. from the University of Houston Law Center, and her B.S. from Florida State University.

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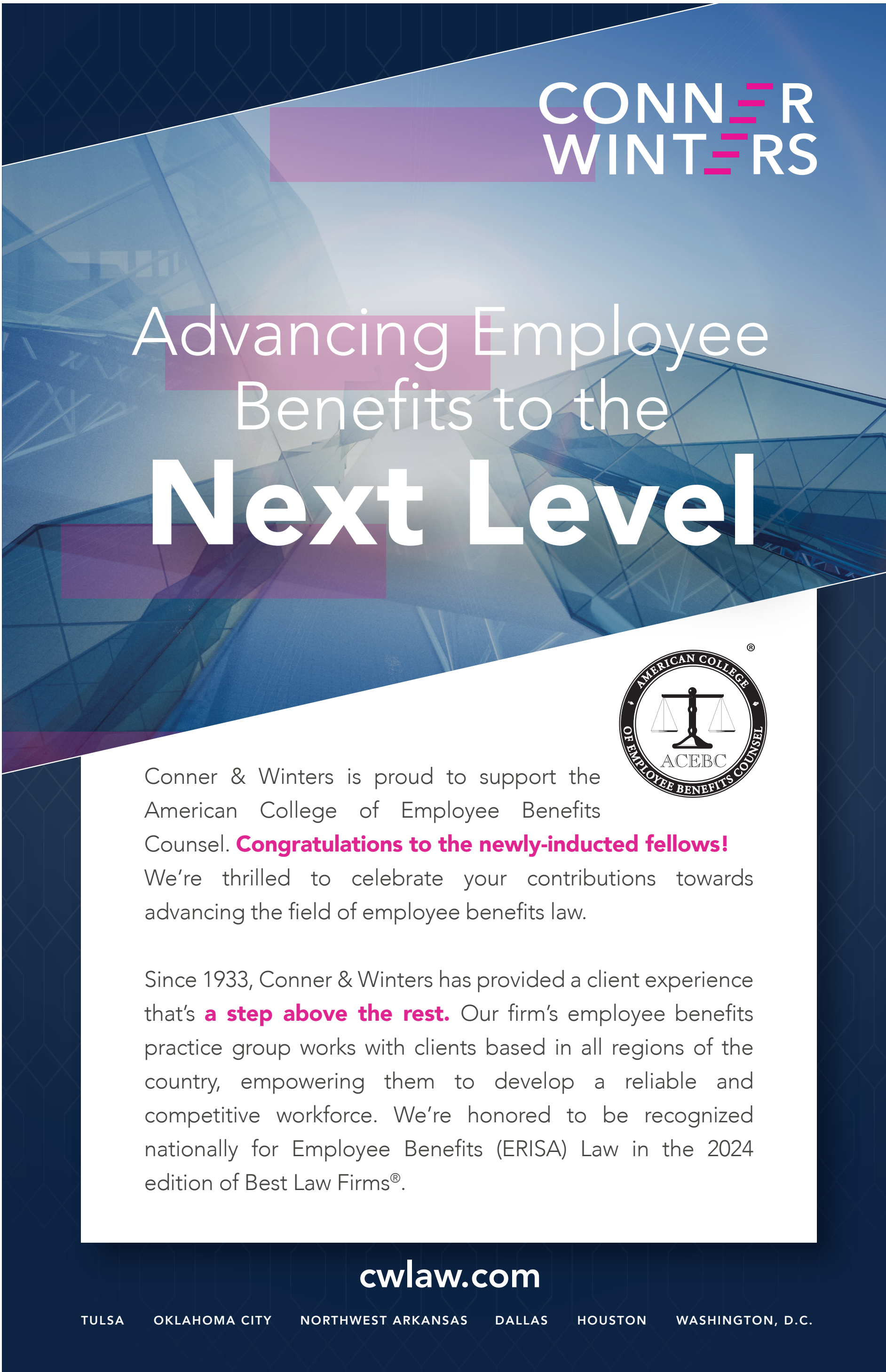
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Advancing Employee Benefits to the
Next Level
AMERICAN COLLEGE OF EMPLOYEE BENEFITS COUNSEL ACEBC ®
Conner & Winters is proud to support the American College of Employee Benefits Counsel. Congratulations to the newly-inducted fellows! We're thrilled to celebrate your contributions towards advancing the field of employee benefits law.
Since 1933, Conner & Winters has provided a client experience that's a step above the rest. Our firm's employee benefits practice group works with clients based in all regions of the country, empowering them to develop a reliable and competitive workforce. We're honored to be recognized nationally for Employee Benefits (ERISA) Law in the 2024 edition of Best Law Firms®.
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About the College

The American College of Employee Benefits Counsel, Inc. (EIN-34-1925042) is an IRC Section 501(c)(3) not-for-profit organization incorporated under the laws of the State of Delaware. The College is dedicated to elevating the standards and advancing the public's understanding of the practice of employee benefits law. In pursuit of this goal, the College encourages the study and development of employee benefits laws, initiates professional discussions of significant employee benefits issues and regularly offers substantively rich education programs about new developments affecting employee benefits and executive compensation.

For more information on College programs, Fellows, the nominating process and more, please visit our website at ACEBC.com

About the Fellows

Fellows of the American College of Employee Benefits Counsel are selected by the Board of Governors from among employee benefits attorneys nominated for that honor and recommended by the Board's Nomination Committee after considering the recommendations of regional screening committees. Fellows have a minimum of 20 years' experience in employee benefits law. Selection as a Fellow reflects the Board's judgment that a nominee has made significant contributions to advancements in the employee benefits field.