

# Your **ERISA** Attorney

Legal Services at a Predictable Fixed Cost from  
Montgomery McCracken's Employee Benefits Group

**Failure to comply with ERISA and its fiduciary requirements puts plan sponsors at risk of costly DOL enforcement actions, IRS penalty assessments, and employee lawsuits. Montgomery McCracken offers a comprehensive package that can help employers manage that risk.**



This program is designed specifically for those employer/plan sponsors that do not have ERISA counsel because they believe they are not at risk, or because they are concerned about the unpredictability of legal costs.

This arrangement gives plan sponsors and fiduciaries ready access to the legal advice that is so vital in today's current climate. For an annual flat fee, we are pleased to provide the following services related to your benefits program:

## **Review of Plans**

We will review your employee benefit plans and programs and provide you with a general assessment of their status and recommendations regarding compliance and fiduciary responsibilities.

## **Training**

To help ensure compliance and fiduciary protection, it is important to make sure your plan is administered in a manner consistent with the terms of the plan and ERISA's requirements. Understanding the issues and risks of providing benefits to your employees is very important.

Montgomery McCracken provides you with up to two (2) annual fiduciary and compliance training sessions at your offices or by webinar. Some of our training topics include:

- Fiduciary Duties and Obligations
- Operation of Plan in Accordance with Plan Provisions
- ERISA and Code Compliance
- Plan Drafting and Design

## Counseling and Research

Throughout the year, the Montgomery McCracken Benefits Group is available to handle day-to-day questions that arise, including issues related to:

- Plan Compliance and Operations
- Summary Plan Descriptions
- Investment Policy Statements
- Enrollment/Eligibility
- Nondiscrimination
- Employee Communications
- Negotiation of Service Agreements with Vendors
- Impact of New Legislation

In connection with these issues, the flat fee also covers up to 10 hours of legal research and/or attorney counseling.

The annual flat fee can be paid on a monthly, quarterly, or annual basis – whichever works best for you. To see if this program is right for you, please contact a member of the Montgomery McCracken Benefits team.

### Contact

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