

JANUARY 22, 2020 | NEWS

M. John Burgess Elected as Second Vice President of the Florida West Coast Employee Benefits Council

TAMPA, FL – Shumaker, Loop & Kendrick, LLP is pleased to announce that Tampa Partner M. John Burgess has been elected as the Second Vice President of the Florida West Coast Employee Benefits Council (FWCEBC) for the 2019 to 2020 year.

FWCEBC provides an educational and networking forum for employee benefits professionals in the Tampa Bay area. The council advances knowledge by exchanging practical application of new legislation, case studies, and compliance for procedures and practices relating to all levels of benefits management.

John brings a depth of experience to his law practice. Focused on employee benefit plans, he is a certified public accountant with an extensive tax and accounting background, which includes experience as an auditor with a large accounting firm. Clients draw on John's ability to take a 360 degree view of their benefit plans and how they affect other areas of their business. His significant experience includes: tax-qualified pension plans, employee stock ownership plans (ESOPs), health and welfare plans, and executive compensation arrangements.

He routinely counsels clients on plan documentation (drafting plan documents, SPDs, amendments, and plan administrative procedures), plan qualification, and other benefit plan issues, including tax and fiduciary matters. John regularly represents clients before the Internal Revenue Service (IRS) and Department of Labor (DOL) in benefits matters. In addition, clients draw on his wide-ranging experience in benefits issues in the context of business mergers and acquisitions, including assistance with due diligence on benefit plans sponsored by an acquired company.

Currently, John devotes a significant portion of his practice to ESOPs, advising clients on matters such as plan design, distribution policies, the structure and implementation of ESOP transactions, and administration matters. Active within the ESOP community, he frequently presents on ESOP issues at national and regional conferences.

INDUSTRY SECTOR

Health Care

SERVICE LINE

Benefits

Corporate, Tax & Transactions

Taxation

MEDIA CONTACT

Wendy M. Byrne

wbyrne@shumaker.com

Clients value John's significant experience assisting in the correction of errors in both qualified and non-qualified retirement plans, including representing clients in Voluntary Compliance Program applications before the IRS. He regularly assists clients with executive employment agreements, severance agreements, change in control agreements, and non-qualified deferred compensation plans, including compliance with Internal Revenue Code Sections 409A, 457(b) and 457(f).

Founded in 1925, Shumaker, Loop & Kendrick, LLP is a full-service law firm with more than 260 lawyers and seven offices in Toledo and Columbus, Ohio; Tampa and Sarasota, Florida; Charlotte, North Carolina; Charleston, South Carolina; and Bloomfield Hills, Michigan. Shumaker is a premier provider of quality legal services. Whether it's commitment to clients or work in the community, involvement lies at the core of all of Shumaker's initiatives.