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M. John Burgess to Make Two Presentations at the NCEO 2020 Employee Ownership Conference

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Wendy M. Byrne
wbyrne@shumaker.com

TAMPA, FL – Shumaker, Loop & Kendrick, LLP is pleased to announce that Partner M. John Burgess will be presenting on two topics at the NCEO 2020 Employee Ownership Conference in Minneapolis. John will be speaking on the topics, "ESOP Distribution Policies and Practices" and "The Mature ESOP Roll-Out: Reintroducing Employee Ownership." This is the 10th year that John has presented at the conference, which offers an educational experience in employee ownership that allows attendees to learn technical skills, create new ideas in expert-led sessions, and learn from peers through extensive networking opportunities. This year's conference runs from April 21st through April 23rd.

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.

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. He is also involved in the establishment of the new Florida Center for Employee Ownership, which will be a state-level organization that will provide education and outreach on ESOPs.

Practicing for more than 15 years, John is also well-versed in individual, corporate, partnership, and estate and gift taxation issues at both the federal and state levels. He uses such knowledge to assist clients in tax planning and compliance issues, including matters for international employees and non-profit organizations.

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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.

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