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M. John Burgess Appointed to Florida Institute of Certified Public Accountants Committees

SERVICE LINE

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TAMPA, FL – The law firm of Shumaker, Loop & Kendrick, LLP, is pleased to announce that M. John Burgess, partner in the Tampa office, has been re-appointed to the Employee Benefits Conference Committee for the Florida Institute of Certified Public Accountants (FICPA). John is serving his third year on the committee, which is tasked with planning, directing, and administering the employee benefit plan topics and speakers for FICPA's Employee Benefits Conference scheduled for 2021. John spoke at this year's virtual conference held on June 10, 2020.

John was also appointed to FICPA's University of South Florida (USF) Accounting Conference Committee which is responsible for planning and presenting a two-day conference for Certified Public Accountants from throughout Central Florida.

John assists clients with all types of employee benefit plans, including tax-qualified pension plans; employee stock ownership plans (ESOPs), health and welfare plans, and executive compensation arrangements. He counsels clients on plan documentation (including drafting plan documents, SPDs, amendments, and plan administrative procedures), plan qualification (including representing clients before the Internal Revenue Service), and other benefit plan issues, including tax and fiduciary matters. In addition, he regularly advises clients on benefits issues in the context of business mergers and acquisitions, including assistance with due diligence on benefit plans sponsored by an acquired company.

John is also a certified public accountant with an extensive tax and accounting background, which includes experience as an auditor with a large accounting firm. He is well versed in individual, corporate, partnership

and estate and gift taxation issues at both the federal and state levels and uses that 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 265 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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