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Shumaker Partner John Burgess to Speak at Tampa and Jacksonville 2021 Fiduciary Summits

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TAMPA, FL – Shumaker Partner John Burgess has been selected to speak at both the Tampa and Jacksonville Fiduciary Summits presented by X Growth Solutions. The Tampa summit will take place on October 19th and the Jacksonville summit on November 3rd. Both summits are stops on the 2021 Retirement Plan Road Show, which has helped thousands of plan sponsors positively impact millions of America's participants. The summits will cover topics, such as retirement industry trends and best practices, financial wellness, benchmarking, and feature round table discussions with local and national industry experts. Finance, human resource, and benefit executives from around the state will be in attendance for the education-focused, workshop style conference. Shumaker is a proud sponsor of both summits, and clients can receive a discount on registration for either summit by using the code "SHUMAKER21".

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, summary plan descriptions

(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.