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Shumaker Partner John Burgess to Present at the NCEO 2021 Fall ESOP Forum

MEDIA CONTACT

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TAMPA, FL – Shumaker Partner John Burgess will be presenting at the National Center for Employee Ownership's (NECO) 2021 Fall Employee Stock Ownership Plans (ESOP) Forum. John's presentation entitled "Practical Ideas for Getting Your Fiduciary Duties Right" will cover the importance of having good fiduciary practices and give ESOP companies practical tips and advice to help them create or improve upon their fiduciary structure. The 2021 Fall ESOP Forum, which will take place virtually, features a robust slate of speakers and topics aimed to help employee-owners tackle the latest and greatest in best practices and start planning new initiatives.

John assists clients with all types of employee benefit plans, including tax-qualified pension 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 (IRS), 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, such as 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. He is a founding member of the Board of Directors of the Florida Center for Employee

Ownership, which serves as a resource for Florida businesses looking to transition to employee ownership, and is the President-elect of the Florida West Coast Employee Benefits Council.

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