

## Rose Panico-Marino



Rose has more than 35 years of experience in the benefits field with primary focus on providing technical consulting and expertise in qualified and nonqualified plan design, administration and compliance. Rose is authorized to represent clients before the Internal Revenue Service on benefit matters and has provided expert testimony on behalf of plan sponsors involved in potential retirement plan litigation. She works closely with legal counsel in matters of dispute regarding compliance issues and has also performed extensive due diligence for businesses in acquisition/merger. She is a frequent speaker throughout the country on matters impacting qualified and nonqualified retirement plans.

At Verisight, Inc. Rose is part of the leadership team focused on driving retirement solutions for clients. Her past experience includes being instrumental in developing a national practice with offices throughout the country, serving clients in all industries. In 1996 she was named Principal and Managing Director of the retirement practice at Altschuler, Melvoin and Glasser (later known as American Express Tax and Business Services). She was also instrumental in the creation of the Council for Independent 401(k) Recordkeepers (CIKR), a sister organization of ASPPA, focusing on legislative and regulatory issues facing independent third party administrators. In 2010 she became a founding lecturer for the Retirement Advisor University at the UCLA Anderson School of Management focusing on driving greater accountability to advisors practicing in the area of qualified retirement plans.

Rose is an expert in the area of retirement plans for both profit and nonprofit organizations and is a frequent speaker on matters affecting such organizations. Rose's experience helps clients structure retirement plans that focus on their objectives and determine their exposure relating to employee benefit liabilities.

## Industry Specialization

- Employee Benefits
- Plan Trust Design
- Plan Administration
- ERISA
- Consulting
- Taxes

## Publications and Presentations

Rose has had numerous speaking engagements including:

- conducting pension fraud seminars for the New York Society of Certified Public Accountants
- covering retirement benefits for tax-exempt organizations for the American Society of Association Executives
- presenting at national conferences sponsored by professional organizations.
- speaking on television and radio talk shows to discuss employee benefit issues authored articles in multiple publications.

## Professional Affiliations and Credentials

- Board Member for the DePaul University Institute for Business and Professional Ethics
- Active member of the Chicago Finance Association
- Active member of the American Society of Pension Professionals and Actuaries (ASPPA)
- Serves on the Board of the Council of Independent 401(k) Recordkeepers
- Enrolled Retirement Plan Agent
- Accredited Investment Fiduciary
- Qualified Plan Administrator

## Education

- BS in Business Administration, DePaul University, Chicago, Illinois
- Courses towards the Graduate School of Banking program, Southern Methodist University, Dallas, Texas