Marcia Wagner

MARCIA S. WAGNER is a specialist in pension and employee benefits law, and is the principal of The Wagner Law Group, which she founded over 15 years ago. A *summa cum laude* and Phi Beta Kappa graduate of Cornell University and a graduate of Harvard Law School, she has practiced law for over twenty-five years. Ms. Wagner is recognized as an expert in a variety of employee benefits issues and executive compensation matters, including qualified and non-qualified retirement plans, all forms of deferred compensation, and welfare benefit arrangements. Ms. Wagner was appointed to the IRS Tax Exempt & Government Entities Advisory Committee, ended her three-year term as the Chair of its Employee Plans subcommittee, and received the IRS' Commissioner's Award. Ms. Wagner has also been inducted as a Fellow of the American College of Employee Benefits Counsel. For the past four years, 401k Wire has listed Ms. Wagner as one of its 100 Most Influential Persons in the 401(k) industry, and she has received the Top Women of Law Award in Massachusetts and is listed among the Top 25 Attorneys in New England by Boston Business Journal. Ms. Wagner has written hundreds of articles and 11 books about retirement and benefit plans. Ms. Wagner is widely quoted in such publications as The Wall Street Journal, Financial Times, Pension & Investments, and more, as well as being a frequent guest on FOX Business, CNN, Bloomberg, NBC and other televised media outlets. She resides in Massachusetts with her husband, Craig, and their four wonderful children.

Jerry Kalish

JERRY KALISH is the President of National Benefit Services, Inc., a firm he founded in 1978. The firm provides actuarial, consulting, and administration services to U.S. employers and multi-national employers with U.S. operations and employees. Mr. Kalish has over 35 years of experience designing, administering and terminating all types of qualified retirement plans; consulting with employers on their fiduciary duties; advising clients on benefit issues in mergers and acquisitions, corporate reorganizations, turnaround situations, and leveraged and employee buyouts; and consulting and providing valuations for post-retirement benefit programs. In addition, he served as an ownership consultant on overseas enterprise development projects sponsored by the United States Agency for International Development. Mr. Kalish provides continuing education programs for attorneys, CPAs and the financial services industry, and is a Guest Lecturer at the John Marshall School of Law LLM in Employee Benefits program. He is a frequent contributor to business publications and has authored and edited two books on employee benefits. Mr. Kalish also is the publisher of The Retirement Plan Blog which he started in 2006.