# CAPITAL FORUM ON PENSIONS 2019

JUNE 5, 2019

## Speaker Biographies

### **Stephen Forbes, J.D.** | KEYNOTE SPEAKER

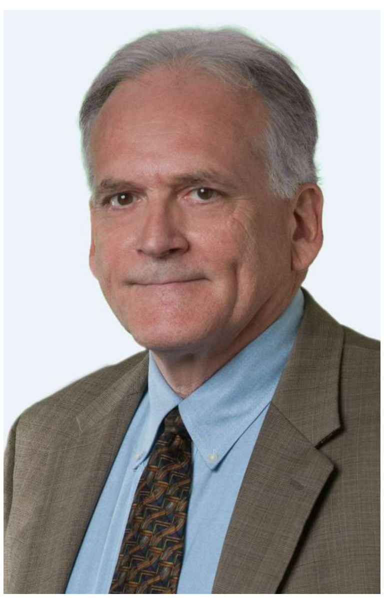
*Stephen is an ERISA attorney and educator with 32 years of experience practicing and teaching in the retirement plan area. Stephen recently returned from a three-year sabbatical where he presided over a mission for his church.*

*Previously, Mr. Forbes was Vice President of SunGard Relius in charge of Relius Education. At SunGard, he taught seminars, conferences and web seminars on retirement plan compliance, design and correction. He also helped draft qualified plan, 403(b), 457(b), 409A and IRA documents and other forms. He was the author of all of the editions of "The Form 5500 Filing Guide" and the co-author of "The Pension Library."*

*Mr. Forbes came to SunGard in the acquisition of Pension Publications of Denver, Inc. where he served as Vice President. Previous to working for PPD, he was a Tax Law Specialist at the National Office of the Internal Revenue Service (Employee Plans Division) where he worked with Master/Prototype Plans, trained IRS employees, wrote IRS Notices and Revenue Rulings and participated in several Treasury regulations committees.*

*After receiving his bachelor's degree, He graduated from Willamette College of Law. He then went on to obtain a Masters of Law degree in Taxation from the George Washington Law Center.*

### **Kevin Donovan, CPA, EA, FSPA, FCA** | Pinnacle Plan Design, LLC



*Kevin is the managing member and founder of Pinnacle Plan Design, LLC, a third-party administrator for employer-sponsored qualified retirement plans. Kevin specializes in designing defined benefit retirement plans to maximize the benefits for business owners and principals. In 2015, Kevin received the American Society of Pension Professionals and Actuaries (ASPPA) Educator's Award in recognition of his contributions to retirement plan education. He is a leading national speaker and published author in the pension field, specifically in the area of cash balance plan design and administration.*

*Kevin earned his Bachelor's of Science in Accounting from Syracuse University and soon after became a CPA. He is a member of the American Institute of Certified Public Accountants (AICPA) and ASPPA, where he has served on the Board of Directors as well as the Government Affairs Committee (GAC).*

*Kevin, along with two other actuaries at Pinnacle Plan Design, authored the 2017 Defined Benefit Answer Book, published by Wolters Kluwer. He is also a founding member of the ASPPA College of Pension Actuaries (ACOPA) and a former instructor for PPD/Corbel, the nation's largest sponsor of continuing education courses for pension professionals. In 2017, Kevin was nominated and named a Fellow of the Society of Pension Actuaries, the highest achievement within ACOPA.*

## **Scott E. Galbreath, J.D., LL.M. (Tax) |** Murphy Austin Adams Schoenfeld, LLP

*Scott leads the Employee Benefits and Executive Compensation Practice Team at Murphy Austin Adams Schoenfeld, LLP (MurphyAustin.com). He has more than 30 years of experience representing employers in ERISA, employee benefits, and executive compensation matters.*

*Born and raised in Chicago, Scott earned his J.D. from IIT Chicago-Kent College of Law as well as an LL.M in Tax with honors from Chicago-Kent. He was recognized as an* Illinois Leading Lawyer in Employee Benefits *in 2006 by the* Leading Lawyer Network*. Scott is a former officer of the Chicago Bar Association's Employee Benefits Committee and former Chair of its Executive Compensation Subcommittee. After practicing law in Chicago for 20 years he moved to California and passed the California bar in 2008. He is a Certified Specialist in Taxation Law by the State Bar of California Board of Legal Specialization and has been recognized by his peers on the Sacramento Magazine "Top Lawyers List" for Employee Benefits for three consecutive years. Scott is also a Fellow of the American College of Employee Benefits Counsel, selected for his significant contributions to the advancement of the employee benefits field.*

*Scott is the President of the Sacramento Chapter of NIPA, and serves on the Board of the Sacramento Chapter of Western Pension & Benefits Council. He is a former President of the Sacramento Chapter of the Western Pension & Benefits Council and has served as a member of the Executive Committee of the Governing Board of the Western Pension & Benefits Council. Scott has also served as Chair of the Sacramento County Bar Association's Tax Section.*

*Scott regularly speaks at industry events on new developments in employee benefits and has had articles published in the* Journal of Pension Benefits, NYU Review of Employee Benefits and Executive Compensation*, and* the California Labor & Employment Review*. He is also the author of The Benefit of Benefits blog available at www.thebenefitofbenefits.com.*

## **Aaron Karr, CRPS, APA, QKA |** Ameriprise Platinum Financial Services

*Aaron Karr has worked in various aspects of the Financial Services and Retirement Plan industry since 1993. He began his career at Franklin Templeton Investments, where in 1994 he took a position in their Retirement Plan services department. This is where he developed a passion for working with retirement plans and launched his career in the industry. Over the past 23 years, he's held positions of a retirement plans phone service representative, plan takeover consultant, plan relationship manager, plan administrative consultant, internal sales support, pension consultant, and most recently, financial advisor. Aaron has helped design over 500 retirement plans for business owners.*

*As a financial advisor with Ameriprise, Aaron guides business owners to identify their goals and objectives in creating customized plan design solutions, helping them understand and manage their fiduciary responsibilities, and working with their employees to help them along on the path towards retirement readiness.*

*Aaron is a member and board member of the Western Pension & Benefits Council of Sacramento, member of the American Society of Pension Professionals and Actuaries (ASPPA) and holds the Qualified 401(k) Administrator (QKA) designation, a member of the National Institute of Pension Administrators and holds the Accredited Pension Administrator (APA) designation, and is also a Chartered Retirement Plan Specialist (CRPS).*

## **William A. Sokol** | Weinberg Roger & Rosenfeld

*Bill Sokol joined Weinberg, Roger & Rosenfeld in 1976. He received his undergraduate degree from the University of Wisconsin, receiving Phi Beta Kappa honors. After a year at Yale Law School, Mr. Sokol pursued a master's degree in Modern American History at the University of California, which he received in 1972. Mr. Sokol received his Juris Doctor from Boalt in 1976. While at Boalt, Mr. Sokol was an editor of the Ecology Law Quarterly.*

*Bill currently practices primarily in the ERISA and Benefits area, representing Pension Funds, Health and Welfare Funds, and Apprenticeship and Training Funds. He serves as both sole counsel and co-counsel on these Funds, in a wide array of industries, from engineers to health care workers to teamsters, in both the private and public sectors. In addition, he devotes considerable time to negotiating Project Labor Agreements (PLAs) in the construction industry. And he continues to represent Unions in their labor relations with employers and members.*

*Bill also teaches labor law at San Francisco State University, in the Labor Studies Department. He has also taught at University of California at Berkeley, the University of San Francisco, Laney College, and San Francisco City College. He also lectures widely on labor law and related topics.*

*Bill also was a talk show host for twenty five years on Pacifica Radio, and a legal commentator on NPR.*