

Publications

Kaleda Comments on Retirement Plan Litigation Trends

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In response to the uptick of retirement plan litigation in recent years and the implications of resulting court decisions on retirement plan advisers and plan sponsors, David Kaleda was quoted in the PLANADVISER article, “ERISA Litigators Reflect on Lessons Learned in 2018.”

Indicating how fiduciaries should strategize going forward he noted that:

...it is important for retirement plan advisers and sponsors to ensure that settlor and fiduciary decisions are kept separate. Furthermore, if an investment committee has placed a fund on a watch list for a long period of time, say two years, but has not made any subsequent decision, the Department of Labor (DOL) would likely see this as cause for an audit or investigation.