

Retirement Services

Groom attorneys are nationally recognized for their forward-thinking work in representing retirement plan sponsors and financial institutions, as well as complex litigation matters involving plan service providers, rabbi trusts and other executive compensation arrangements.

Areas of Focus

PLAN SERVICES & PROVIDERS

Plan service providers rely on Groom for assistance with issues arising under ERISA, the Internal Revenue Code, and other applicable state and federal laws.

INVESTMENT OF PLAN ASSETS

Groom attorneys combine the right tools, resources, and comprehensive experience to tactfully advise clients on their most important plan investment projects.

AUDITS & INVESTIGATIONS

We leverage our in-depth knowledge of plan investments and operations to assist plan sponsors and financial institutions with Department of Labor investigations and Internal Revenue Service audits.

FINANCIAL INSTITUTIONS & ADVISERS

We assist financial institutions and advisers with regard to the design and delivery of products and services in the retirement plan marketplace.

IRAS/HSAS

Our decades-long focus on health and retirement plans uniquely positions us to assist our clients in the development, marketing, and management of IRAs and HSAs.

RETIREMENT SERVICES ADVOCACY

Drawing on our substantive experience and leveraging our inside-the-Beltway connections, Groom advances retirement policy for employers and service providers.

RETIREMENT SERVICES LITIGATION

Groom litigators have a proven track record of representing retirement service providers in complicated, “bet the company” litigation.

“The firm offers consistently excellent, strong, and current expertise. Its ability to deliver to budget and its overall value for money is strong. Groom is always my first stop for what is happening in the industry.”

– Client