

Stacey Grundman

Senior Attorney

Washington DC

T +1 202 457 6178

stacey.grundman@squirepb.com



About Stacey

Stacey Grundman advises clients on employee benefit and executive compensation matters, including the design, implementation, governance, operation and regulatory compliance of qualified and nonqualified retirement plans, equity and executive compensation arrangements, and health and welfare plans. Her practice covers the complex range of issues that arise under ERISA, the Internal Revenue Code, the Affordable Care Act, COBRA and HIPAA, as well as issues facing public and collectively-bargained pension plans. Ms. Grundman regularly addresses the fiduciary, plan governance and prohibited transaction issues that clients face and applies her comprehensive knowledge of employee benefits and executive compensation to corporate transactions.

Ms. Grundman also helps corporate clients achieve their philanthropic goals by providing sound advice on the various structures for charitable programs, governance and tax issues and by guiding these clients through the process of forming charitable entities and obtaining IRS and state recognition of their tax-exempt status.

Ms. Grundman's prior professional experience includes the US Department of Labor and the Internal Revenue Service, where she focused on qualified retirement plans. She also served as a judicial law clerk to the Honorable Ellen Segal Huvelle of the US District Court for the District of Columbia and worked for members of both the US House of Representatives and the US Senate.

Experience

- Responding to day-to-day inquiries and counseling on employee benefit matters for a variety of private and publicly traded corporations and other business entities, including many with employee stock ownership plans (ESOPs).
- Applying comprehensive knowledge of employee benefits to provide due diligence support, analyze transaction documents, analyze application of 409A and 280G, and provide post-closing advice in connection with mergers and acquisitions.
- Evaluating corporate transactions with respect to employment and benefits compliance for insurers, and providing representations and warranties coverage to buyers.
- Designing and drafting US and non-US equity and incentive plans and award agreements.

- Designing and implementing qualified plan corrections measures and preparing IRS and US Department of Labor (DOL) filings, as needed, as well as serving as a resource for affected plan participants.
- Supported a successful effort to obtain IRS approval for transfer of excess defined benefit plan assets to a qualified replacement plan.

Credentials

Education

- Georgetown University, J.D.,
- Georgetown University, M.A.,
- Brown University, B.A.,

Admissions

- District of Columbia, 2002
- Maryland, 2005

Recognitions

- Recognized in *The Best Lawyers in America* 2021 and 2023: Ones to Watch for Labor and Employment Law – Employee Benefits in Washington DC

Expertise

Services

- Tax Strategy & Benefits

About our firm

One of the world's strongest integrated law firms, providing insight at the point where law, business and government meet. We deliver commercially focused business solutions by combining our legal, lobbying and political capabilities and invaluable connections on the ground to a diverse mix of clients, from long-established leading corporations to emerging businesses, startup visionaries and sovereign nations. More than 1,500 lawyers in over 40 offices across four continents provide unrivaled access to expertise.