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Pannone Lopes Devereaux & West Teams Up with Independent Financial Partners for a Seminar on Recent Court Decisions on ERISA 401(k) Plans and Compliance

Providence, RI – November 9, 2015 – Pannone Lopes Devereaux & West LLC ([PLDW](#)) and Independence Financial Partners ([IFP](#)) are teaming up to host a seminar on recent court decisions that affect 401(k) plans and require diligent attention to new compliance and regulatory issues. “Limit Your Liabilities: Managing ERISA 401(k) Plans in a New Legal Environment” will be co-presented by PLDW Partner William E. O’Gara, Attorney Bernard A. Jackvony, PLDW Of Counsel and Managing Partner of IFP Kevin J. Beaulieu, ChFC®, AIF®. The free workshop is scheduled for Tuesday, Dec. 1, 2015, from 8 a.m. to 10 a.m. and will be held at PLDW’s Providence office at 317 Iron Horse Way, Suite 301. Seating is limited and RSVPs are recommended. Please email Geri Riccio at griccio@pldw.com or call 401-824-5100 to register or click [here](#) to view the e-invitation and register. A continental breakfast will be available.

The highly experienced employment and estate practitioners and veteran financial management expert will share their insight and knowledge in this interactive workshop and take an in-depth look at new court decisions in regard to fiduciary duties of care and loyalty and compliance issues. Topics also covered include 401(k) plan designs and how to identify and remedy potential weaknesses in a 401(k) plan. Seminar attendees will learn how to better protect employers’ investments and employees’ plans and stay in compliance with 401(k) laws and regulations.

Presenter biographies follow:

- **William E. O’Gara** is a co-founder and Partner at PLDW, who leads the firm’s Litigation and Employment Teams. He is a highly respected labor and employment law practitioner with a significant depth of experience handling diverse matters before federal and state courts and administrative agencies. With over 25 years of experience, Attorney O’Gara’s diverse practice includes defending wrongful termination and discrimination claims, contract negotiations and matters of union representation. He routinely represents employers in matters ranging from

sexual harassment to retirement issues, and provides mediation services to resolve disputes and avoid costly litigation. To learn more about Attorney O’Gara’s practice, please click [here](#).

- **Kevin J. Beaulieu**, ChFC®, AIF®, has been the Managing Partner of IFP since 2002. He has over 25 years of experience in the financial management industry helping clients with their financial investments, protection, retirement strategies and planning and employer benefits. As an Accredited Investment Fiduciary (AIF) advisor, Mr. Beaulieu is an expert in guiding clients through a prudent investment process in a role of trust, confidence, and/or legal responsibility. IFP is a leader in helping employers confidently provide cost-efficient and competitive qualified and non-qualified retirement benefits to their employees. To learn more about Mr. Beaulieu’s firm and experience, please click [here](#).
- **Bernard A. Jackvony** is Of Counsel with PLDW and a nationally recognized fiduciary litigator. Attorney Jackvony concentrates his practice in the areas of trusts and estates including litigation, administration and planning for individuals, families, fiduciaries, and charitable organizations. He has represented clients in fiduciary litigation in Rhode Island, Florida, New Jersey, California, New York, Massachusetts, and Oklahoma. Mr. Jackvony served the citizens of Rhode Island as Lieutenant Governor in the late 1990s. To learn more about Attorney Jackvony’s practice, click [here](#).

To contact Attorneys O’Gara or Jackvony, please email wogara@pldw.com and bjackvony@pldw.com or call 401-824-5100. To contact Mr. Beaulieu, email kbeaulieu@indfp.com or call 401-691-4112. For more information about PLDW, visit www.pldw.com or follow us on Twitter ([@pldwllc](https://twitter.com/pldwllc)) and stay up-to-date with the firm’s activities on [YouTube](#), [LinkedIn](#), [Facebook](#), [Google+](#) and [Pinterest](#).

About Pannone Lopes Devereaux & West LLC

The attorneys and staff at Pannone Lopes Devereaux & West LLC (PLDW) are committed to developing practical and cost-effective solutions while also being supportive of the community in a meaningful way. PLDW has developed a business model that combines international expertise with a more cost-effective delivery system that involves cross training of lawyers and a more practical approach to problem solving. PLDW’s primary practice areas include corporate and business law, nonprofit law, health care law, municipal infrastructure, government relations and legislative strategies, employment law, special masterships, criminal defense, civil litigation, estate planning, probate and trust litigation, and real estate development and commercial lending. The partners demand of themselves and those on the PLDW team, an unparalleled sense of urgency and responsiveness which is derived from an authentic appreciation for their clients and the community in which they serve. For more information, visit www.pldw.com.

About Independence Financial Partners

Independence Financial Partners has been helping individuals, families and businesses achieve their financial goals for over 100 years. Established in 1909, Independence Financial Partners’ history is a testament to our dedication to our clients. Today, our full service firm serves Southern New England from its main offices in Warwick, Rhode Island and Rocky Hill, Connecticut. For more information, visit www.indfp.com.