



DAVID ALDERSON, JD

Technical and Research Consultant

Areas of Expertise

Technical & Research
Regulatory & Legislative
Updates
Plan Compliance
Government Plans
Plan Documentation
Determination Letters
Regulatory Compliance
Fiduciary Compliance
Fiduciary Assessments

David is a licensed attorney who joined BPS&M's Technical and Research Department in 2000. He advises clients on compliance matters relating to plan documentation, disclosure, corrections, and other issues relating to IRS and DOL regulations and guidance. David oversees BPS&M's prototype and volume submitter program, filing of IRS determination letter requests, and submission of EPCRS applications. He is currently a member of IRS Determination Letter Liaison Group, a roundtable consisting of IRS representatives and members from the employee benefits private sector. With a background in business law, municipal government, and public finance, David has 25 years of experience in governmental compliance and legal drafting.

Education

San Joaquin College of Law, Clovis, CA — JD
California State University, Fresno, CA — BA, Journalism

Publications and Presentations

- *IRS Eliminates Five-year Restatement Cycle for Individually Designed Plans, Developments, 2015*

Professional and Community Involvement

- California Bar Association
- National Association of Public Pension Attorneys

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