



JOHN LUCAS, JD, CPA, CPC

Principal

Areas of Expertise

Technical & Research
Plan Design
Fiduciary Training
Legislative & Regulatory Updates
Plan Compliance
Merger / Acquisition / Divestiture Consulting
Regulatory Compliance
Fiduciary Assessments
Fiduciary Compliance
Plan Documentation
Determination Letters

John Lucas is the director of BPS&M's client-facing Technical & Research Services. After spending over 15 years working as a tax and employee benefits consultant, primarily with a national accounting firm, John joined BPS&M in 2001 and became a principal in 2003.

Drawing on the wealth of experience and contacts that John has made in almost 30 years in the field of employee benefits, John is a "go-to" resource for complicated and arcane compliance matters for our firm and our clients.

Typical client projects that John is involved with include:

- plan design consulting
- complex draft document preparation
- compliance, corporate governance, and fiduciary review projects
- assisting clients with the resolution of ERISA or tax-qualification compliance defects
- consulting related to business acquisitions or divestitures

Education

Marshall University, Huntington, WV — J.D.
University of Akron, Akron, OH — B.A.

Publications and Presentations

- *Outsourcing 401(k) Plan Fiduciary Functions*, Developments, 2014
- *Additional Guidance on Windsor Decision*, Developments, 2014
- *ESOPs: Life after Dudenhoëffer*, Developments, 2014
- *DOMA, Same-Sex Marriage and Employee Benefit Plans*, Developments, 2013

Professional and Community Involvement

- American Bar Association
- American Institute of Certified Public Accountants
- American Society of Pension Professionals and Actuaries (ASPPA)

Contact Me

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