

Jodi L. Green

Partner, Employee Benefits & DOL Compliance
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Overview

Jodi L. Green is an ERISA attorney with experience at the U.S. Department of Labor (DOL) in the Employee Benefits Security Administration (EBSA), where she worked for over a decade. She specialized in complex, high-dollar retirement plans and matters involving third party providers such as TPAs and investment banks. Clients seek her counsel for her unique perspective on how to administer federally compliant retirement plans.

At EBSA, Jodi trained extensively in ERISA legal interpretation, fiduciary liability, financial forensics for employee benefit plans, conflict of interest analysis, and investment fees and service provider expenses.

Jodi shares her advice in publications, including *Benefits Magazine* and *Journal of Pension Benefits*, and she speaks at CPEs and benefit plan conferences, including the Association of International Certified Professional Accountants (AICPA) and the International Foundation of Employee Benefits Plans (IFEBP).

To provide the highest quality of services for her clients, Jodi provides a specialized practice in:

- Strategic solutions to maintain or correct compliance with the DOL and IRS.
- Representation of clients during all phases of a DOL investigation.
- Compliance assessments and fiduciary training to reduce legal risks and the likelihood of government investigations.
- In-house counsel for plan sponsors, financial advisors, auditors, and TPAs in the business of employee benefit plans.
- Litigation and trial support.
- Educational training, including CPEs.

Specialties

401(k) Plans
403(b) and 401(a) Plans
Defined Benefit Plans
Employee Stock Ownership Plans
Executive Compensation Arrangements
Health Plans & Trusts
Multi-Employer Plans
Open Multiple Employer Plans
PEO/ Closed Multiple Employer Plans
Prevailing Wage Plans
Profit Sharing Plans
Union / Apprenticeship Plans

Compliance Assessments
DOL and IRS Corrections
Fee Disclosure Compliance
Fiduciary Risk and Liability
Forensic Audits & Evaluations
Government Investigations

Awards

U.S. Secretary of Labor Exceptional Achievement Award honored in 2013, 2017, 2018, and 2019.



Tatum Hillman & Powell, LLP offers the benefit of superior quality work without the inefficiencies often found in traditional law firms. Through WBENC, THP has gained national recognition by major U.S. corporations and federal, state, and local governmental entities. Clients range from Fortune 100 companies to small businesses and individuals, covering everything from simple legal questions to complex multi-million dollar transactions.