

RESUMÉ

B. SHANA SAICHEK, ESQ.

Employee Benefits Law, ERISA

Shana Saichek has provided legal advice and litigation services to employee benefit plan sponsors in the public and private sectors since 1980. She has experience with a wide variety of health and welfare, pension and profit sharing, 401(k), apprenticeship, prepaid legal, cafeteria, sick leave/salary conversion, and flexible spending account arrangements. In the past decade, Shana has developed a highly tax-favored retiree medical reimbursement plan, and has helped establish more than twenty tax-exempt trusts for funding these plans.

Ms. Saichek was formerly the Associate Director of Research and Vice President for a national actuarial and benefits consulting firm in New York, where she was responsible for research and analysis of legislative, regulatory and judicial developments at the state and federal level affecting employee benefit plans. Previously, she was in private practice with a concentration in multiemployer (Taft-Hartley) plans in several industries.

Ms. Saichek received her law degree from the University of Washington, and her Bachelor of Arts degree (summa cum laude) in history from the University of California at San Diego. She is a member of the State Bar of California, Washington State Bar, and New York State Bar, and has been admitted to practice before several federal District courts.

Ms. Saichek is also a frequent speaker and author on employee benefit plan issues. She is a co-author of the website entitled, www.retireemedicaltrust.com.

Professional Activities:

- NCPERS Task Force on Health Care Benefits of Public Employees and Retirees (National Conference of Public Employee Retirement Systems, Washington, D.C., 2002-present)
- Public Sector Plans Subcommittee of the ABA Labor & Employment Law Section (1993-2004)
- Editorial Board of "Health and Welfare Benefits Alert" (New York Law Publ. Co.) (1993-1995)
- Co-chair of the ABA Special Task Force on National Health Care Reform (1991-1992)
- Co-chair of the Welfare Plans Subcommittee of the ABA Labor and Employment Law Section (1990-1993)

- Board of Directors of the ABA Standing Committee on Prepaid Legal Services Plans (1986-1991)
- Employee Benefits and Executive Compensation Committee of the ABA Business Law Section (1989-1991)

Publications and Speeches:

- “Bolstering Public Safety Employee Retiree Medical Benefits,” Public Safety Employees Pension and Benefits Conference (October 14-17, 2007, Palm Springs California)
- “Update: Tax Favored Retiree Medical Plans,” The National Conference on Public Employee Retirement Systems (NCPERS-The Voice for Public Pensions), Public Sector Health Care Symposium & Exhibition (September 13-15, 2006, Chicago, Illinois)
- “How to Create a Retiree Medical Trust,” National Association of College and University Attorneys, 45th Annual Conference (June 26-29, 2005, Orlando, Florida)
- “Creating a Retiree Medical Trust – How Employers and Employees Can Use Pre-Tax Dollars to Fund Retiree Medical Costs,” NCPERS Annual Conference & Exhibition (May 8-12, 2005, Las Vegas, Nevada)
- “Pension Health Care Crisis,” Public Safety Employees Pension & Benefits Conference (October 20-23, 2002, Palm Springs, California)
- “The How To’s for Successfully Increasing Your Members’ Benefits,” Guns and Hoses 2002 Fire and Police Pension Fund Forum (September 22-25, 2002, Miami Beach, Florida)
- “Healthcare Crisis: Our Solutions,” Public Employees Department, International Conference, Laborers International (September 11-14, 2002, Seattle, Washington)
- “Healthcare: Problems and Costs, Tax-Favored Retiree Medical Plans,” NCPERS 61st Annual Conference (April 28 – May 2, 2002, Hollywood, Florida)
- “Legislative Developments in Public Sector Plans,” International Foundation 46th Annual Employee Benefits Conference (November 11 – 15, 2000, Honolulu, Hawaii)
- “Enhancing Financial Security During Retirement,” Public Safety Employees Pension & Benefits Conference (October 22-25, 2000, Palm Springs, California)
- “Independence and Relationship of Investment Managers and Investment Consultants,” International Foundation 44th Annual Employee Benefits Conference (October 9-14, 1998, Las Vegas, Nevada)
- “Issues in Trustee Ethics,” International Foundation Benefits Conference for Public Employees (August 18, 1998, Seattle, Washington)

- “Overview of the Employee Retirement Income Security Act,” Seminar on *ERISA Fundamentals* by the National Business Institute, Inc. (April 18, 1996, Seattle, Washington)
- “Health Care Reform in Washington” (impact of federal law), Washington State Council of Police Officers (October 6, 1994, Spokane, Washington)
- “Health Reform: Opportunity for Trade Associations,” Washington Society of Association Executives (March 15, 1994, Seattle, Washington)
- “How to Reduce Employee Benefits Lawfully,” Personnel Law Update 1993, Council on Education and Management (December 2-3, 1993, Seattle, Washington)
- “State Approval Required for Self-Insured Health Plans,” *Association of Washington Cities Trust Update*, (February 1993)
- “Welfare Plans: Common Questions and Recent Developments under ERISA and the Internal Revenue Code,” ABA National Institute on ERISA Basics (June 3-5, 1992, San Francisco, California)
- “ABA Health Care Reform Task Force: Draft Resolution on Health Care Reform,” submitted to the Mid-Winter 1992 meeting of the Employee Benefits Committee of ABA Section of Labor and Employment Law (co-chair of Task Force)
- “Reporting & Disclosure Obligations of Employee Benefit Plans,” *The Business Lawyer* (editor to article by ABA Business Section, Committee on Employee Benefits and Executive Compensation, 1993)
- “Defined Contribution Plan Update,” May, 1992 Employee Benefits Conference of the Washington Society of Certified Public Accountants.
- *Employee Benefits Law and its 1989-1994 Supplement* (BNA Books; Wash. D.C. 1991) (Chapter Editor and Contributing Author to the book written by members of the ABA Section of Labor and Employment Law, Employee Benefits Committee)
- “Benefit Claim Issues in 1990: A Review of Major Federal Court Decisions,” *Benefits Law Journal* (Winter 1991)
- “Group Benefits Legislation in 1990,” *Pension World* (December, 1990)
- “COBRA -- Interplay with Other Requirements on Continuation of Group Health Coverage,” *Benefits Law Journal* (Vol. I, No. 4, Winter 1988-89)
- “Reporting and Disclosure,” American Bar Association National Institute on ERISA Basics (April 14-15, 1988, New York, N.Y.)
- “Putting a Trustee’s Duties in Context,” American Prepaid Legal Services Institute Seventh Annual Conference (March 2-5, 1988, Miami, Florida)
- “Treasury Department Proposed Regulation on COBRA Continuation of Coverage Rules” (written with Mazo, J.F.), published in the Fall 1987 *Conference Materials of the National Coordinating Committee for Multiemployer Plans*
- “Workshop on Legal Service Plans for Employees Benefit Fund Trustees and Counsel: Public Employee Trust Funds,” American Prepaid Legal Services Institute Sixth Annual Conference (October 29-November 1, 1986, Tucson, Arizona)
- “Dividing Retirement Benefits in Marital Dissolution Cases,” *Journal of Pension Planning and Compliance* (Vol. 12, No. 1, Spring 1986)

- “Legal-Legislative Update,” IFEBP Benefits Seminar for Representatives of Multiemployer Plans (February 6, 1985, Seattle, Washington)
- “Fiduciary Responsibility,” Public Employees Conference of the International Foundation of Employee Benefit Plans (August 3-6, 1983, Seattle, Washington)
- “Employee Benefits Summary,” IAM&AW District Lodge #751 Seminar (October 23-24, 1981, Hood Canal, Washington)