

**BARRY KOZAK**

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*Abridged Resume, current as of July 2011 - full CV available at [www.barrykozak.com](http://www.barrykozak.com)*

**CURRENT EMPLOYMENT**

**Director of Elder Law Studies, The John Marshall Law School, Chicago - 2010 to present** I have developed the overall curriculum and individual class syllabi for the JD Certificate in Elder Law, and am in charge of all aspects of quality control, growth, and operation.

**Associate Director of Graduate Employee Benefits Programs, The John Marshall Law School, Chicago - 2010 to present**  
I assist the Director in marketing and administering the LLM and MS degree programs in Employee Benefits, and have direct review over the performance of adjunct professors, mentor and advise the students, and maintain contact with alums.

**SELECTED TEACHING EXPERIENCE**

**Adjunct Professor, The John Marshall Law School, Chicago - 2000 to present**

Survey of Retirement Plan Issues — developed and taught 17 times  
Survey of Retirement Plan Issues (on-line distance education version) — developed and taught 2 times (will teach Fall 2011)  
Elder Law: Financial Planning and Other Aspects — developed and taught 3 times (will teach Fall 2011)  
Elder Law: Introduction — developed and taught 3 times  
Elder Law: Preserving Dignity and Independence of the Elderly — taught 2 times  
Income Taxation — taught 5 times  
Taxation of Corporations, Corporate Transactions, and Shareholders — taught 2 times  
Compensation Law: Taxation and Other Legal Issues — developed and taught 6 times  
Tax and Employee Benefits Research — developed and taught 2 times  
Current Topics in Information Technology Law Workplace Privacy — co-taught 2 times  
Introduction to Legal Analysis — co-taught 3 times  
Substantive Law Overview — co-taught 3 times  
Sexual Orientation Law — co-taught 2 times

**Adjunct Professor, DePaul University College of Law, Chicago - 2010 to present**

Employee Benefits Law — taught 2 times

**PROFESSIONAL DESIGNATIONS**

**The University of Chicago Harris School of Public Policy Studies, Chicago - MPP (Public Finance), 2009**  
**The John Marshall Law School, Chicago - JD and LLM (Employee Benefits), 2000**  
**The University at Albany (State University of New York), Albany - BS (Applied Statistics), 2004 *in absentia***

**SELECTED PRESENTATIONS**

**Certified Pension Consultant** - The American Society of Pension Professionals and Actuaries, 2001 (in good standing)  
**Attorney** - Illinois ARDC, 2000 (in good standing)  
**Chartered Financial Consultant** - The American College, 1996 (in good standing)  
**Enrolled Actuary** - The Joint Board for the Enrollment of Actuaries, 1995 (in good standing)  
**Registered Representative (Series 7 and 63)** - NASD (now FINRA), 1995 (voluntarily inactivated)  
**Life and Health Insurance Broker** - New York State Department of Insurance, 1995 (voluntarily inactivated)

**SELECTED LEADERSHIP POSITIONS (CURRENT)**

American Association of Law Schools - Chair, Section on Employee Benefits; Chair-Elect, Section on Aging Law  
American Bar Association Real Property, Trust, and Estate Law Section - Vice-Chair, Long Term Care, Medicaid and Special Needs Trusts Committee of the Elder Law, Disability Planning and Bioethics Group  
American Bar Association Section of Taxation - Vice-Chair, Membership and Marketing Committee; appointed to the Section's Long-Range Planning Committee  
American Bar Association Section of Labor & Employment Law - Co-Chair, Welfare Plans—Technical and Statutory Regulations Subcommittee of the Employment Benefits Committee  
National Academy of Elder Law Attorneys - Student Articles Editor, *The NAELA Journal*; member, Academic Committee  
Elder Law and Miscellaneous Remedies Division of the Circuit Court of Cook County - member, the planning workgroup of Hon. Patricia Banks, Presiding Judge

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### CURRENT AREAS OF RESEARCH INTEREST

Using a target benefit approach to adequately fund individual account retirement plans (awaiting reaction to my white paper);  
The ethics for elder law attorneys in impoverishing middle-income clients through Medicaid planning (almost complete);  
Adequate retirement income for an aging population (almost complete; would like to produce a text book in addition to an article);  
A comparative look at elder law statutes and initiatives between China and the United States (in progress with a co-author);  
Funding and investment issues with public sector pension plans;  
The availability of employee benefits to same-sex spouses, civil union spouses, and same-sex domestic partners; and  
The role of government in curbing excessive executive compensation practices

### TEXT BOOKS AND TREATISES

"Employee Benefit Plans," Carolina Press (2010), Textbook and Teachers Manual  
"Employee Benefit Plans and Issues for Small Employers," 353-4th T.M., BNA Portfolios, Compensation Planning series (2010)  
"CPA's Guide to Retirement Plans for Small Businesses," AICPA (2010, 3rd ed.), co-editor and lead contributing author  
"457 Answer Book," Wolters Kluwer (2011, 6th ed.), contributing author (forthcoming)

### SELECTED MAJOR ACADEMIC ARTICLES AND SCHOLARLY CONTRIBUTIONS

*White Paper: How Congress Can Amend the Code to Make Target Benefit Plans More Attractive to Employers*, NYU Review of Employee Benefits and Executive Compensation (2011) (forthcoming)  
*Domestic Partnership and Same-Sex Spouse Issues With Employer Provided Health Benefits: The Intersection of Federal Income Tax Principles With Individual State Income Tax Regimes*, NYU Review of Employee Benefits and Executive Compensation (2010)  
*A Review of Cash balance Plan Backloading and Whipsaw Litigation*, NYU Review of Employee Benefits and Executive Compensation (2010), co-author  
*The Funding of Public Sector Pension Plans: Are They Truly in Crisis Mode?* 21 Benefits L.J. 23 (2008)  
*Much Ado About the Meaning of 'Benefit Accrual': The Issue of Age Discrimination in Hybrid Cash Balance Plan Qualification is Dying But Not Yet Dead*, Employee Benefits and Executive Compensation: Proceedings of New York University's 59th Annual Conference on Labor (2006), co-author  
*Cash Balance Plans: An Integral Part of the Defined Benefit Plan Renaissance*, 37 J. Marshall L. Rev. 753 (2004)

### SELECTED PRESENTATIONS

*An Objective Discussion on Public Sector Plans: Focus on Retirement Adequacy for Professors and Judges*, moderator, the American Association of Law Schools, Program of the Section on Employee Benefits, Annual Meeting (Washington DC, 2012) (forthcoming)  
*The Mathematical and Actuarial Analysis of Retirement Financial Needs*, presenter, the Great Lakes TE/GE Council, Quarterly Meeting (Chicago, July 2011)  
*Illinois Public Sector Plans*, guest interviewee, "Justice and Law Weekly," hosted by the president of the Chicago Bar Association (aired on WYCC Channel 20 TV, PBS, Chicago, June 2011)  
*Sex and Sexuality After Sixty*, moderator, the National Academy of Elder Law Attorneys, Workshop, Annual Meeting (Las Vegas, 2011)  
*So Now That You Are Retired: What Risks Do You Face With Your Retirement Income*, presenter, the American Society of Pension Professionals and Actuaries, workshop, Annual Meeting (Washington DC, Oct. 2010)  
*Employing Stock: U.S. and Foreign taxation of Employee Stock Options*, moderator, the American Bar Association Section of Taxation, Program of the Teaching Taxation Committee, Fall Meeting (Toronto, Sept. 2010)  
*An Introduction to ERISA for Benefit Professionals*, presenter, the Worldwide Employee Benefits Network, Webinar (Sept. 2010)  
*Executive Compensation, Retirement Policy, and the Great Recession*, panelist, the American Association of Law Schools, Program of the Section on Employee Benefits, Annual Meeting (New Orleans, 2010)  
*Federal Regulation of Health Benefit Plans*, presenter and member of faculty, the American Bar Association Joint Committee on Employee Benefits, National Institute on ERISA Basics (Chicago, June 2009)  
*Pedagogy of Teaching Same-Sex Spouse and Domestic Partnership Issues in a Tax or Employee Benefits Class*, panelist, the American Association of Law Schools, Program of the Section on Sexual Orientation and Gender Identity Issues, Annual Meeting (San Diego, Jan. 2009)  
*The Time Horizon to Fully Fund a Public Sector Pension Plan By Comparing Projected Pension Promises Growth to Projected Tax Base Growth*, testimony (invited), the American Academy of Actuaries, Public Forum on Public Pension Disclosures (Washington DC, Sept. 2008)