THE BAR ASSOCIATION OF SAN FRANCISCO

The Bar Association of San Francisco's Lunch and Learn series present

Retirement Plans for Law Firms: 401(k) Basics & Options

SPEAKERS

Patrick Collar
Nicholas Pension Consultants

Troy Johnson
T. Rowe Price/Partnership

MODERATOR

Matthew P. Herrick, CFA®, CFP®, Esq.
Herrick Wealth Advisory

Explore tailored retirement plan options for law firms, including SEP IRAs, SIMPLE IRAs, and 401(k)s, to find the best fit based on your firm's size, income, and goals. Learn strategies to maximize tax efficiency and retirement savings for partners and key employees. Stay compliant with fiduciary responsibilities and ERISA regulations to protect your practice and avoid costly mistakes.

TOPICS

- Overview of qualified retirement plan options tailored to small and mid-size law firms, including SEP IRAs, SIMPLE IRAs, and 401(k)s
- Key features, benefits, and compliance requirements of traditional and Safe Harbor 401(k) plans
- Comparison of costs, administrative responsibilities, and contribution limits across plan types
- Discussion on plan design flexibility for partner/shareholder contributions and profit sharing
- Basics of large law firm 401(k) plans, including nondiscrimination testing, fiduciary obligations, and participant education strategies

Tuesday, September 30, 2025

Virtual Program
12:00 - 1:00 p.m.

No MCLE will be provided.

Location

Virtual
Zoom link will be provided before event.

Pre-registration is required

Cost
FREE BASF Members
$50 Non-members

Register online: www.sfbar.org/calendar

Event Code: G251618D

Note: Herrick Wealth Advisory and The Bar Association of San Francisco are not affiliated.