McDonald Hopkins Attorney **Insight.** Business **Foresight.**®

Dale R. Vlasek

Senior of Counsel
Cleveland
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“ I create innovative yet practicable ERISA plan designs to achieve employer objectives and develop workable resolutions to benefit plan problems. ”

Practice Focus

- Employee benefits and ERISA
- ESOP transactions
- Healthcare restructuring
- Executive compensation and governance

Dale is chair of the Employee Benefits Practice Group. He focuses his practice on all employee benefit matters including pension, profit sharing and 401(k) planning design, operation and compliance matters, ESOPs, welfare benefit plans (e.g., group health, life, dependent care programs) design, operation and compliance matters, ERISA litigation, and multi-employer pension plans. He serves as benefits counsel to a number of middle-market and larger companies. Dale is licensed to practice in Ohio, Iowa and Wisconsin.

Dale earned his J.D., with high distinction, from the University of Iowa College of Law in 1982, and a Ph.D. from the University of Iowa in 1978. He received an M.A. and B.A. from Cleveland State University in 1972 and 1970, respectively.

Admissions - State

- Iowa
- Ohio
- Wisconsin

Education

- University of Iowa College of Law
- University of Iowa
- Cleveland State University

Honors and Awards

- Named leader in Ohio Employee Benefits and Executive Compensation - *Chambers USA* (2018-2020)
- Named one of the *Best Lawyers in America* (2006-2021)

- Selected as a Lawyer of the Year by Best Lawyers (2019)
- Selected for inclusion in *Ohio Super Lawyers* (2005-2006, 2008, 2011-2018)

Professional Membership

- Ohio State Bar Association
- Iowa State Bar Association
- Worldwide Employee Benefits Network
- ESOP Association

Alerts

- COBRA subsidy under the American Rescue Plan
- New Retirement Plan Limitations Announced by the IRS for 2021
- What you need to know about the SECURE Act: Part II – Optional provisions
- What you need to know about the SECURE Act: Part I – Mandatory provisions
- Still time to defer taxes with a strategically designed retirement plan
- IRS announces new retirement plan limitations for 2020
- IRS announces new retirement plan limitations for 2019
- ESOP trustees are increasingly becoming targets
- What you need to know about ESOP valuation season
- IRS announces new retirement plan limitations for 2018
- Revisiting the Affordable Care Act
- What employers need to know about the American Health Care Act
- Cures Act delivers cure for small employers
- IRS announces new retirement plan limitations for 2017
- Greenlight: IRS lets LLCs adopt ESOPs
- IRS announces new retirement plan limitations for 2016
- Does Your Retirement Plan Fiduciary Monitor Your Plan Investments?
- The DOL Proposed Regulations on Fiduciaries
- Affordable Care Act: Medical expense reimbursement plans may need amendment

Blog Posts

- IRS temporarily authorize electronic remote witnessing of retirement plan consent
- DOL final regulations establish an alternative safe harbor for electronic disclosure of ERISA information
- Coronavirus pandemic prompts liberalization of cafeteria plans, FSAs, and dependent care reimbursement plans
- CARES Act and retirement programs
- Coronavirus creates challenges for ESOP companies
- Protecting the health of retirement plans from COVID-19, Part III: Administrative and fiduciary issues for retirement plans
- Protecting the health of retirement plans during the COVID-19 crisis, Part II: Gaining access to retirement

benefits

- Protecting the health of retirement plans during the COVID-19 crisis, Part I: Reducing or eliminating employer contributions
- Deadline extended for contributions to IRAS, Qualified Retirement Plans, Health Savings Accounts, and Archer MSAs
- COVID-19: Continuing healthcare coverage for furloughed or laid-off employees
- New safe harbor for electronic disclosure of ERISA information
- Tax Court rules S corp can't deduct accrued but not paid payroll expenses
- IRS issues guidance for verifying hardship distributions
- IRS reverses position: Using forfeitures in Safe Harbor Plans
- Avoid this common succession planning mistake!
- End of an era: Routine IRS determination letters for qualified plans phased out
- The DOL encourages state-sponsored retirement programs for private employers
- Plan mistakes got more expensive
- It's here: DOL releases fiduciary regulations
- If you blinked, you missed it: Form 5500 extension repealed
- New partnership and LLC audit rules will affect IRA and Plan investments
- Auditing the auditors: The DOL urges scrutinizing retirement plan auditors
- Happy with your 401(k)? There is still time to make changes
- DOL proposes rules to assist state-sponsored retirement programs
- With this ring – we get benefits
- Financing alternatives in ESOP deals for small business
- FROZEN: A good movie -- Maybe not a good plan investment strategy
- ESOP Appraisers Not Fiduciaries Yet
- HHS Requires Skinny Plans to Put on Some Weight
- DOL drops "Appraiser as Fiduciary" Rule
- New Year's Resolution: Update Your Beneficiary Designations

News

- Lawyer of the Year honorees Riley and Welin among 42 McDonald Hopkins attorneys recognized as 2021 Best Lawyers
- McDonald Hopkins recognized in Chambers USA 2020 Rankings
- 41 attorneys from McDonald Hopkins recognized as 2020 Best Lawyers®
- McDonald Hopkins recognized in Chambers USA 2019 rankings
- "Reviewing PEO Benefits Plan Documents"
- McDonald Hopkins Recognized by Chambers USA 2018
- 22 attorneys at McDonald Hopkins named 2018 Ohio Super Lawyers and Rising Stars
- 35 attorneys at McDonald Hopkins selected for inclusion in Best Lawyers® 2018
- "Start-up Guide: Benefits Plans In The Co-Employment World Of PEOs"
- 39 attorneys at McDonald Hopkins selected for inclusion in Best Lawyers 2017
- 24 attorneys at McDonald Hopkins named Ohio Super Lawyers and Rising Stars
- 41 attorneys at McDonald Hopkins selected for inclusion in Best Lawyers® 2016

External Publications

- "Healthcare Flexible Savings Accounts: 'Use-It-Or-Lose-It' Rule Modified," RBMA Monthly Legal Update Digest December 2013
- "Health Care Reform: Practical Steps for Employers," RBMA Monthly Legal Update Digest March 2013
- "Employer 'Pay or Play' Mandate in 2014 – Will it Apply to Your Business?," RBMA Monthly Legal Update Digest February 2013
- "Health Care Reform: It's the Law!," RBMA Monthly Legal Update Digest December 2012
- "How changes to health care laws will impact businesses in the short and long term," Smart Business Magazine, September 2012
- "Department of Labor New Disclosure Rules: What Employers Need to Know," RBMA Monthly Legal Update Digest December 2011
- "The IRS Announces New Pension Plan Limitations for 2012," RBMA Monthly Legal Update Digest November 2011
- "Compliance Tests," Published in the Journal of Accountancy, May 2009

Events

- Restarting Healthcare: Readiness, Risk and Response | Thursday, May 21, 2020
- Coronavirus and employee benefit plans: Practical considerations for employers | Thursday, April 30, 2020
- The SECURE Act and key provisions affecting retirement plans | Tuesday, February 25, 2020
- Cybersecurity and employee benefit plans: Are you at risk? | Wednesday, July 17, 2019
- Employee benefits challenges and opportunities — Before year end and beyond | Wednesday, November 7, 2018
- The Certificate Program for Non-Professional ESOP Fiduciaries | Monday, September 11, 2017
- Beneficiary Designations: Who gets the money? | Thursday, June 1, 2017
- Smart Business ASPIRE 2016 | Wednesday, May 18, 2016
- Third Party Sales | Thursday, January 15, 2015