



Vincent P. Cacciottoli

Owner - Portland

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Vincent Cacciottoli brings over 30 years of experience, knowledge and insight to bear in navigating employers through the complex laws that impact the design, operation and termination of employee benefit and executive compensation plans. Mr. Cacciottoli serves as an advisor to the boards, committees, trustees and key executives of private and public companies, financial institutions and nonprofit organizations.

He resolves compliance issues for retirement, health and welfare and executive compensation plans. He also negotiates the administrative and investment contracts and agreements for those plans, advises on fiduciary and directors' and officers' liability, corporate governance and plan investment issues, and he handles benefit and executive compensation issues in mergers and acquisitions.

Mr. Cacciottoli is also a popular speaker on employee benefits and executive compensation issues with business and professional groups.

Services

- ▶ Employee Benefits and Executive Compensation
- ▶ Tax

Industries

- ▶ Communications, Media and Information Technology
- ▶ Emerging Companies
- ▶ Financial Services
- ▶ Hospitality, Travel and Tourism
- ▶ Government
- ▶ Healthcare
- ▶ Manufacturing and Distribution
- ▶ Maritime Companies and Fisheries
- ▶ Sports, Arts and Entertainment
- ▶ Technology and E-Commerce

- ▶ Transportation and Logistics
- ▶ Accounting Firms

Education

- ▶ Fordham University School of Law, J.D., 1975
- ▶ New York University, B.A., 1972

Admissions

- ▶ Oregon, 1979
- ▶ New York, 1976

Professional Recognition

- ▶ Named by peers to *The Best Lawyers in America* in the area of Employee Benefits and Executive Compensation, 2001-2012
- ▶ Named by peers to *Portland Monthly* magazine's "Best Lawyers" list, 2001-2012
- ▶ Named by peers as a "Super Lawyer" in *Oregon Super Lawyers* magazine, 2006-2011
- ▶ Martindale-Hubbell AV/5.0 Peer Review Rated

Professional Activities

- ▶ Fellow, American College of Employee Benefits Counsel, 2006-present
- ▶ Member, Board of Directors, Western Pension & Benefits Conference, Portland Chapter, 1983-present
- ▶ President, Western Pension & Benefits Conference, 1997-1998
- ▶ Former Editor, *Benefits Bulletin*, Western Pension & Benefits Conference
- ▶ Member, Planning Committee, Oregon Society of Certified Public Accountants Biannual Employee Benefits Conference, 1993-present

Events

- ▶ "Hot Topics (Tax-Related) in Employee Benefits and Executive Compensation," Oregon State Bar Taxation, Business Law and Estate Planning Sections, Portland, OR, November 10, 2011
- ▶ "Tax and Estate Planning With IRAs and Roth IRAs," Sigma Investment Management Company, Portland, OR, June 7, 2011
- ▶ "How to Supercharge Your 401(k) Plan--Introduction to Cash Balance Plans," Portland Tax Forum, Portland, OR, May 19, 2011
- ▶ "Preparing for Change: Impacts of New and Pending Legislation on Employers in 2009," Garvey Schubert Barer, Portland, OR, January 13, 2009
- ▶ Downsizing, Executive Severance and 409A Tax Compliance: How to Implement a Layoff and Avoid Long-term Consequences, Garvey Schubert Barer, Seattle, WA, December 3, 2008
- ▶ "409A: Do They Really Mean It This Time," Oregon State Bar Taxation Section, Portland, OR, August 14,

2008

- ▶ "409A: End Game Strategies," Western Pension and Benefits Conference Annual Meeting, Seattle, WA, July 13-16, 2008
- ▶ "Coping With the Final 409A Regulations - A Practitioner's Viewpoint," Oregon State Bar Taxation Section, Portland, OR, May 10, 2007

Publications

- ▶ "Form 1099 Reporting: Two Burdensome Rules Repealed, But Some Traps Remain," Garvey Schubert Barer Legal Update, May 2011.
- ▶ "Changes in Benefit Plan Rules Require Employer Action Before Year-End," Garvey Schubert Barer Legal Update, November 30, 2010.
- ▶ "Penalty-Free IRS Section 409A Correction Program Expires this Year," Garvey Schubert Barer Legal Update, November 30, 2010.
- ▶ "Are You Ready for the Health Care Reform Changes Coming with Your 2011 Plan Year?," Garvey Schubert Barer Legal Update, November 30, 2010.
- ▶ "Changes in Benefit Plan Rules Require Employer Action Before Year-End," Garvey Schubert Barer Legal Update, November 30, 2010.
- ▶ "Implementing the New 401(k) and 403(b) "In-Plan" Roth Conversion Option Requires Immediate Action," Garvey Schubert Barer Legal Update, November 30, 2010.
- ▶ "Over-the-Counter Drugs No Longer Reimbursable by FSAs or HRAs Starting in 2011," Garvey Schubert Barer Legal Update, November 30, 2010.
- ▶ "Health Care Reform: Understanding the Impact On Your Clients' Bottom Line," Garvey Schubert Barer Publication, September 21, 2010.
- ▶ "Voter Approved Domestic Partnership Rights: Are You Prepared for Changes to Your Employee Benefits and Policies?," Garvey Schubert Barer Legal Update, December 2, 2009.
- ▶ "The IRS Announces 2010 Cost of Living Adjustment for Retirement Plans," Garvey Schubert Barer Legal Update, October 20, 2009.
- ▶ "Top 10 Questions About the New COBRA Rules: April 18 Deadline Requires Employers to Take Immediate Action," Garvey Schubert Barer Legal Update, March 17, 2009.
- ▶ "Failure to Amend Common Compensation Arrangements by December 31, 2008 Could Result in Huge Tax Penalties," Garvey Schubert Barer Legal Update, November 19, 2008.
- ▶ "Your Business Needs To Be Concerned About § 409A (Even If It Doesn't Have A Deferred Compensation Plan)," Garvey Schubert Barer Legal Update, October 24, 2008.