

## ***CORPORATE PARALEGAL PROFILE***

### **Kelly L. Cook, CEBS**

*Even with over thirty years of experience and substantial training, I still learn new things every day. The employee benefits area of law is constantly changing and evolving. Keeping up with ERISA statutory, regulatory and judicial developments is both challenging and exciting.*

**Name** Kelly L. Cook

**Location** Syracuse, New York

**Title** CEBS, Manager Employee Benefits Department

**Specialty** ERISA/Employee Benefits Law

**Education** BA Elmira College; Paralegal Certificate in Litigation Management, The Institute of Paralegal Training; Certified Employee Benefit Specialist (CEBS) Designation, International Foundation of Employee Benefit Plans and the Wharton School of the University of Pennsylvania

**Experience** 31 years

Kelly Cook is a paralegal and manager of the employee benefits department of Blitman & King LLP, a Syracuse, New York, law firm dedicated to workplace issues. Blitman and King employs 18 attorneys and 7 paralegals. Kelly reports to the partners in the Employee Benefits Department. After receiving her BA and a paralegal certificate in litigation management, Kelly continued her education to become a Certified Employee Benefit Specialist. As manager of Blitman & King's Employee Benefits Department, Kelly coordinates with the attorneys and other paralegals regarding client assignments and she assists with management of workloads and applicable deadlines. She also helps

train new associates and paralegals in the Employee Benefits Department.

Kelly works with clients who have single-employer and multi-employer pension and welfare benefit plans. These clients include sponsors of qualified retirement plans (defined benefit plans, defined contribution plans, and 401(k) plans) and non-qualified deferred compensation plans, as well as a variety of insured and self-insured health plans, health reimbursement arrangements (HRAs), and apprenticeship and training plans.

While Kelly's position is focused on employee benefits, her job duties are still very diverse. She provides assistance to the attorneys and their clients relative to preparation of plan documents, including trust agreements, summary plan descriptions, annual and periodic notices to participants, service provider agreements, as well as benefit applications and other operational forms. Kelly also assists plan sponsors and coordinates with service providers concerning reporting and disclosure requirements, applications for IRS tax-exempt status, Internal Revenue Service and U.S. Department of Labor audits, and litigation involving employee benefit plans.

Because Blitman & King specializes in employee benefits, changes in the ERISA field can present both opportunities and challenges to the firm's attorneys and paralegals. When new legislation is adopted, they first work to gain an understanding of the changes in the law, then determine what is necessary to implement the changes for all of their affected employee benefits clients. The final step is management of the document modifications and client informational needs to accomplish timely implementation.

Implementing changes brought on by the Patient Protection and Affordable Care Act (PPACA) was an "all hands on deck" project for Blitman & King. The health law changes had to be analyzed and the necessary information disseminated to over 30

clients. Benefit plan documents for affected plans had to be appropriately amended with new provisions and procedures designed for the benefit of participants and the necessary participant notices had to be prepared and distributed. A few years later, new IRS reporting requirements for health insurance issuers and group health plans presented new challenges. Kelly was responsible for overseeing the entire project – from start to finish. Kelly's advice to new paralegals?

*Read everything you possibly can. Every time you read an article or a Court decision that refers to a statutory provision or a regulation, look it up and read it as well. Also, create research (topic) folders and file articles of interest related to those topics in them. This will save valuable time later, and it is particularly helpful in the ERISA field where the law is constantly evolving – it's like a giant jigsaw puzzle; the more pieces you can put together, the more clear the picture becomes.*