Barry Kozak

he / his / him

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Suggested introduction:

Barry Kozak is a seasoned professional who has been a professor at several law schools, an attorney at several law firms, and an actuary and consultant at various pension administration firms. He established Estate Law HELP to assist individuals and families in aging with dignity, happiness, purpose, and financial, physical and mental health. He also established Retirement HELP to assist small employers with the design, education and communication of their employee benefits programs, especially in the areas of financial wellness and retirement. He received his JD and LLM in Employee Benefits degrees from The John Marshall Law School in Chicago and his master's degree from the University of Chicago Harris School of Public Policy Studies.

Barry's career arc:

CAREER	ACHIEVEMENTS	LEADERSHIP	TEACHING
2009 – present, After Graduate School			
Managing Attorney, Estate Law HELP, LLC, www.estatelawhelp.com Chicago, IL, 2019-present **Owner and Educator**, Retirement HELP, Inc., www.retirementhelp.consulting Chicago, IL, 2019-present **ERISA Regulatory Consultant, Aging Workforce Management Consultant, and Financial Wellness Consultant,** October Three, LLP, Chicago, IL, 2017-2019 **Attorney**, The Law Offices of Barry Kozak, Chicago, IL, 2015-2017 **Director of the JD Certificate in Elder Law program,** The John Marshall Law School, Chicago, IL, 2010-2015	Earned the following professional designations: ▪ Retirement Income Certified Professional, The American College of Financial Services (2018, still active) ▪ Notary Public, Office of the Illinois Secretary of State (2016, still active) Appointed as a Distinguished Scholar in Residence in elder law and financial gerontology at Loyola University Chicago School of Law Matriculated in the Ph.D. program in Disability Studies at University of Illinois at Chicago Presented research at the 3rd World Congress on Adult Guardianship Received a Distinguished Service Award from The John Marshall Law School Alumni Association	Society of Financial Services Professionals (serves on the board of directors of the Greater Chicago Chapter) Chicago Sister Cities Shanghai Social Services exchange committee (served as co-chair, led a delegation of Chicago professionals to learn how Shanghai supports its elderly population, and hosted several delegations from China) The Elder Law & Misc. Remedies Division of the Circuit Court of Cook County (served as a member of the Advisory Task Force for the Development and Installation of the new division) National Association of Elder Law Attorneys (served in several editorial board positions at the national level and served on the board of directors of the Illinois chapter)	Developed and taught two Elder Law classes at Loyola University Chicago School of Law's general J.D. curriculum Invited as a visiting lecturer at East China University of Political Science and Law, Shanghai, China to teach classes (in English) on Diminished Mental Capacity, the American Legal System, and Legal Writing for American Lawyers and Judges Developed and taught various elder law classes in The John Marshall Law School's J.D. Certificate in Elder Law program Created the curriculum for a new J.D. Certificate in Elder Law program in response to the request from the Dean of The John Marshall Law School Taught various income tax, estate planning, and elder law classes in The John Marshall Law School's general J.D. curriculum

2007 – 2009, Graduate School

University of Chicago Harris School of Public Policy Studies, M.P.P. in Public Policy with a concentration in Taxation (received 2009)

- Served on the editorial board of its academic journal, *Chicago Policy Review*
- Voluntarily submitted a master's thesis predicting retirement savings if the U.S. were to adopt a consumption tax regime

CAREER	ACHIEVEMENTS	LEADERSHIP	TEACHING
2000 – 2007, After Law School			
Associate Director of the graduate Tax Law and Employee Benefits programs, The John Marshall Law School, Chicago, IL, 2005-2010 **ERISA Regulatory Consultant,** CCA Strategies, Chicago, IL, 2001-2005 **ERISA Associate Attorney**, Bell Boyd & Lloyd, Chicago. IL, 2000-2001	Scholarship included a textbook, a treatise, and the publication of several law review articles Drafted the initial learning objectives and the bank of questions for a professional designation exam (one of the exams to qualify for the QKA designation offered through the American Society of Pension Professionals and Actuaries) Selected as one of the inaugural Nolan Fellows at the American Bar Association Tax Section Attorney, Illinois (2000, still active)	Chicago Bar Association (served in numerous roles, including as a member of its Board of Managers, as the *pro bono* Employee Benefits attorney on its internal finance committee, as the chair of numerous substantive committees, and as a select member of other internal *ad hoc* committees, such as membership, technology, and the unauthorized practice of law) American Bar Association Tax Section (served in numerous roles, including as Vice-chair of its Membership and Marketing committee, and as a member of the editorial board of several academic journals and less formal newsletters and year-end regulatory summaries)	Taught various individual income tax, taxation of corporations, estate planning, workplace privacy and elder law classes in The John Marshall Law School's general J.D. curriculum Taught Employee Benefits Law at DePaul University of Chicago College of Law's LL.M. in Tax Law program Developed and taught various technical and professionalism classes in The John Marshall Law School's LL.M. in Employee Benefits program Invited to teach IRS Employee Plan agents at several of their internal training programs

1996 – 2000, Law School

The John Marshall Law School (now UIC John Marshall Law School), Chicago, IL, J.D. and LL.M. in Employee Benefits (both received 2000)

- Participated in two inter-scholastic Moot Court competitions
- Selected for two consecutive years as the single student liaison to the American Bar Association Tax Section
- Chaired the Estate Planning committee and served in leadership roles at the Young Lawyers Section of the Chicago Bar Association

2000 – 2007, After College

Actuary and Team Leader, Consulting Actuaries Int'l, New York, NY, 1994-1996 **Director of Actuarial Services,** Belcor Pension Consultants, New York, NY, 1993-1994 **Retirement Plan Consultant and Plan Administrator,** Pay Plans Corp., New York, NY, 1990-1993 **Senior Pension Administrator,** The Ibex Group, New York, NY, 1988-1990 **Pension Administrator,** Improved Funding Techniques, Lynbrook, NY, 1987-1988	Earned the following professional designations: ▪ Enrolled Actuary, U.S. Department of Treasury (1995, currently inactive) ▪ General Securities Representative (Series 7) and Uniform Securities Agent (Series 63), Financial Industry Regulatory Authority (1995, both currently inactive) ▪ Chartered Financial Consultant, The American College of Financial Services (1996, still active) ▪ Life & Health Insurance Broker, New York Dept. of Financial Services (1990, currently inactive)

1983 – 1987, College

State University of New York at Albany (now the University at Albany), B.S. in Applied Statistics (received *in absentia* 1994)