

Josephine S. Harvey

SHAREHOLDER

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Josephine Harvey doesn't shy away from a challenge. Her practice covers a broad range of complex topic areas, with a particular focus on executive compensation and compliance matters. Her work experience also includes ESOPs and other tax-qualified defined contribution plans, tax-qualified defined benefit plans, and welfare plan compliance and design. Josie has worked directly with both the U.S. Internal Revenue Service and the U.S. Department of Labor.

Josephine also counsels a wide range of clients, including investors, investment funds, investment companies, fund managers (including registered investment advisers), private money managers and other institutional investors relating to the impact of ERISA and certain Internal Revenue Code requirements on such investments, including addressing ERISA plan asset and operating company compliance, such as matters relating to Venture Capital Operating Companies (VCOCs) and Real Estate Operating Companies (REOCs).

Education

- Georgetown University Law Center (J.D., *cum laude*, 2003)
- Texas A&M University (B.A., *summa cum laude*, 2000)

Bar Admissions

- Texas, 2003

Recognition

- Selected for inclusion by *Texas Monthly*, as a "Texas Rising Star," 2006-2011

Capabilities

- Employee Benefits & Executive Compensation
- Nonprofit Organizations
- Employee Stock Ownership Plans

Publications

July 8, 2016

Time for a Wellness Check on your Wellness Program? New EEOC Regulations Could Diagnose Need for Change

April 23, 2015

Highly Anticipated Proposed EEOC Guidance May Force Design Changes on Existing Wellness Programs