

Julie Flynn

BENEFITS ANALYST

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Julie C. Flynn provides sophisticated and comprehensive employee benefits plans that are designed to achieve the business goals of each client. She works tirelessly to protect their interests, realize value and pursue business success. Julie is a Benefits Analyst who is designated as a Certified Employee Benefits Specialist (CEBS). Julie has worked over 15 years in the employee benefits field gathering the skills, knowledge and acumen to assist attorneys and clients with the ever changing laws relating to employee benefits. Julie's experience encompasses:

Health, Welfare and Cafeteria Plans. Julie prepares health and welfare benefits plan, wrapper plan and cafeteria plan documents, and other employee communication and compliance materials. Julie is proficient in the following welfare benefits laws:

- Patient Protection and Affordable Care Act (PPACA)
- Employee Retirement Income Security Act (ERISA)
- Consolidated Omnibus Budget Reconciliation Act (COBRA)
- Health Insurance Portability and Accountability Act (HIPAA)
- Tax compliance
- Other laws impacting welfare, cafeteria and fringe benefit plans.

Qualified Retirement Plans. Julie prepares defined contribution plan and defined benefit plan documents, including similar plans for governmental and church entities and drafts employee communication and compliance materials, including:

- Plan Amendments/Restatements
- Summary Plan Descriptions (SPDs) and Summary of Material Modifications (SMMs)
- Administrative Service Agreements
- Resolutions
- Notices
- Qualified Domestic Relations Order (QDRO) review and procedures
- Loan procedures

Internal Revenue Service (IRS) / Department of Labor (DOL) Compliance and Audits.

Julie prepares tax qualification applications to the IRS and assists with investigations and audits before the IRS and DOL. She works on finalizing initial application corrections and

Capabilities

- Employee Benefits & Executive Compensation

compliance failures under IRS/DOL Voluntary Compliance Programs (VCP), Delinquent Filer Voluntary Compliance (DFVC) programs, and Voluntary Fiduciary Correction Programs (VFCP).

Mergers and Acquisitions. Julie regularly assists in mergers and acquisitions with respect to employee benefits/ERISA issues including qualified retirement benefits and health and welfare benefits. In connection with these projects, Julie prepares and revises acquisition agreements relating to employee benefits and documentation needed to implement benefit plan mergers, spin-offs, terminations and freezes. She also assists with due diligence and compliance issues that result in such acquisitions.

Education

- University of North Texas (B.B.A., 1992)

Recognition

- Certified Employee Benefit Specialist certificate under the CEBS Program sponsored by the International Foundation of Employee Benefit Plans and the Wharton School of the University of Pennsylvania
- Retirement Plans Associate certificate (RPA) under the CEBS Program
- Group Benefits Associate (GBA) under the CEBS Program