



Richard J. Helmreich

partner

Rich represents clients large and small as a primary relationship manager. He counsels clients on general business issues including corporate governance compliance, strategic growth initiatives, merger and acquisition opportunities, and corporate finance prospects. He addresses complex client issues in all areas of the law often coordinating with internal and external professionals. In this role, Rich serves on several boards of directors/advisors.

Rich serves as chair of Porter Wright's Employee Benefits Practice Group, where he regularly advises employers on the full range of their employee benefit plan issues.

In the tax-qualified retirement plan area, Rich has assisted employers in the design and implementation of tax-qualified retirement plans of all types, including defined benefit pension plans, profit sharing plans, 401(k) plans, money purchase pension plans, employee stock ownership plans (ESOPs), collectively bargained union plans and 403(b) tax deferred account plans for tax-exempt organizations. Rich has substantial experience with leveraged ESOP transactions.

In the health and welfare plan area, Rich has assisted employers with the implementation of group health, dental, long term disability and group term life insurance benefits, including the design of self-insured medical benefits plans, cafeteria plans, tax-exempt VEBA trusts and third-party administration agreements.

In the nonqualified plan and executive compensation area, Rich has designed comprehensive management incentive programs with stock options, stock appreciation rights, phantom stock and restricted stock. He has prepared nonqualified deferred compensation plans, supplemental executive retirement plans, excess benefit plans and individualized

CONTACT

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SOCIAL MEDIA

Blogs

employeebenefitslawreport.com

EDUCATION

The Ohio State University College of Law, J.D., 1989

Oxford University, Oxford, England,
Summer Law Program, 1987

Bowling Green State University,
B.S., 1986

Ecole Superior de Commerce,
Nantes, France, Summer
Economics Program, 1985

SERVICES

Employee Benefits

- Retirement plans
- Health and welfare plans
- Nonqualified deferred compensation and executive compensation
- Employee Stock Ownership Plans (ESOPs)

deferred compensation arrangements to provide targeted tax deferred compensation to executive management teams.

Of particular significance, Rich has substantial experience in mergers and acquisitions and securities laws as they relate to employee benefit plans. In the securities practice, he has assisted employers in implementing employer stock based plans, including participant-directed employer stock investment funds in profit sharing and 401(k) plans, and employee stock purchase plans while addressing the Form S-8 registration statement and Form 11-K annual report filing requirements.

In 2007, Secretary of Labor Elaine L. Chao appointed Rich to a three-year term on the Advisory Council on Employee Welfare and Pension Benefit Plans, also known as the ERISA Advisory Council. Rich has received recognition in *The Best Lawyers in America*® and is AV Preeminent rated by Martindale-Hubbell®. He is also listed in *Chambers USA* as one of the leading attorneys in Employee Benefits & Executive Compensation Law. Rich was named by *The Best Lawyers in America*® as a 2021 and a 2025 “Lawyer of the Year” in Employee Benefits (ERISA) Law in Columbus, Ohio.

BAR ADMISSIONS

- Ohio
- U.S. District Court for the Southern District of Ohio

PRESENTATIONS

- “Understanding SECURE Act 2.0: Expanding Access and Increasing Retirement Savings,” Porter Wright, March 7, 2023

PUBLICATIONS

- “Further insights on the NQDC guide,” *Fulcrum Partners*, July 2021

PROFESSIONAL ASSOCIATIONS

- Columbus Bar Association, Employee Benefits Committee, Chair, 1999-2001; Vice-Chair, 1997-1999
- Certified Employee Benefit Specialist Program
- Ohio State Bar Association
- National Center for Employee Ownership
- The ESOP Association
- U.S. Department of Labor, ERISA Advisory Council, 2007-2009

HONORS | AWARDS

- *Chambers USA*, Employee Benefits & Executive Compensation, Band One, Ohio
- *The Best Lawyers in America*®
- *The Best Lawyers in America*® “Lawyer of the Year,” Employee Benefits (ERISA) Law, Columbus, Ohio, 2021, 2025
- *Columbus Business First*, Forty Under 40, Class of 2000
- Martindale-Hubbell®, AV Preeminent

COMMUNITY

- Columbus Association for the Performing Arts, Board of Trustees, Pro Bono Legal Services
- Leadership Columbus, Class of 2002

SERVICES (CONTINUED)

Employee Benefits

- Tax-exempt and governmental employers
- ERISA fiduciary compliance
- ERISA and employee benefits litigation
- Benefits issues related to mergers and acquisitions
- Audits and correction
- Equity and non-equity based incentive plans
- ERISA insurance and indemnification

Business Growth & Operation

- Organization, planning and financing
- Corporate governance
- Business transactions
- Board and committee counsel
- Executive compensation
- Tax planning
- Business succession planning
- Hospitality

Labor & Employment

- Executive compensation
- Hospitality

Mergers & Acquisitions

- Due diligence
- Employee benefits
- Employee Stock Ownership Plans (ESOPs)

Automotive & Mobility Emerging Technologies

- Workforce management
- Startups, business formation and operation

Securities

- Regulatory compliance and corporate governance

Financial Institutions

- Mergers and acquisitions, and other regulatory matters

Education

Entrepreneurship & Startups

- Hospitality

- Northwest Presbyterian Church, Men's Council, President, 2000-2001; Vice President, 1999-2000
- Dublin Soccer League, Coach, 1997-2002
- Salvation Army, Food Truck Volunteer
- Angel Tree
- Operation Feed

SERVICES (CONTINUED)

Litigation

- Hospitality

Real Estate

- Hospitality