



Richard J. Helmreich

Rich counsels clients on business issues including strategic growth initiatives, merger and acquisition opportunities, and corporate finance prospects. He spends significant time serving on several different 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 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)

Partner

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SOCIAL MEDIA

Blogs

employeebenefitslawreport.com

EDUCATION

The Ohio State University Michael E.
Moritz 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)
- Tax-exempt and governmental employers
- ERISA fiduciary compliance
- ERISA and employee benefits litigation

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. Among the other honors Rich has received are 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 has been named a *Best Lawyers*[®] 2021 Columbus, OH Employee Benefits (ERISA) Law “Lawyer of the Year.”

Bar Admissions

Ohio

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

Presentations

- “Employee Stock Ownership Plans (ESOPs): A Tax-Advantaged Strategy,” Porter Wright, Sept. 23, 2014

Honors | Awards

- *Best Lawyers*[®], Employee Benefits (ERISA) Law, “Lawyer of the Year,” 2016 and 2021
- *Best Lawyers*[®], Employee Benefits (ERISA) Law and Litigation-ERISA
- *Chambers USA*, Employee Benefits & Executive Compensation, Band One, Ohio
- *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
- 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)

Employee Benefits

- 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

Labor & Employment

- Executive compensation

Mergers & Acquisitions

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

Securities

- Regulatory compliance and corporate governance

Financial Institutions

- Mergers and acquisitions, and other regulatory matters

Education

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