



## Lucas J. Pagels Shareholder

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Lucas J. Pagels is a shareholder in Reinhart's Employee Benefits Practice. He advises a wide range of benefit plan sponsors, fiduciaries and service providers on issues concerning various tax qualification, contract negotiations, investment arrangements and fiduciary compliance. He also advises clients regarding design and implementation of several types of tax-qualified retirement plans, including profit sharing, 401(k) and defined benefit plans, and assists with the administration and compliance of such plans.

Lucas represents clients in interactions with various government agencies and correction programs, including the Internal Revenue Service, the Department of Labor and the Pension Benefit Guaranty Corporation. He counsels clients in connection with the redesign of retirement programs, including the merger, freezing and/or termination of tax-qualified plans.

Lucas is also a member of Reinhart's Institutional Investor Services group and advises multiemployer pension funds and other institutional investors in connection with private equity and hedge fund investments and their fiduciary responsibilities relating to alternative investments.

Lucas primarily serves clients in the following areas:

- Qualified Retirement Plans
- Employee Benefits Plans in Mergers and Acquisitions
- Employee Stock Ownership Plans
- Institutional Investor Services
- Taft-Hartley Multiemployer



## Education

- J.D., cum laude, University of Wisconsin Law School
- B.S., summa cum laude, University of Wisconsin-La Crosse (Finance and Economics)

## Bar Admissions

Wisconsin

## Practices

- Employee Benefits
- Institutional Investor Services

## Services

- Corporate and Governmental Benefit Plans
- Multiemployer Plan (Taft-Hartley)
- Employee Benefits Plans in Mergers and Acquisitions
- Employee Stock Ownership Plans
- Qualified Retirement Plans

## Matters

- Represents several employee retirement plans, including Profit Sharing Plans, Employee Stock Ownership Plans (ESOPs), 401(k) plans and Taft-Hartley and corporate pension plans
- Assists institutional investors and plan sponsors regarding alternative investments through private equity, international, real estate and hedge funds
- Develops strategies for various stock transactions and ownership transfers through ESOPs
- Assists plan sponsors with plan design, plan drafting and restatements
- Assists clients in all aspects of tax-qualification and ERISA fiduciary compliance and governance

## Honors & Affiliations

Honors

- *Best Lawyers in America*, Employee Benefits (ERISA) Law

Affiliations

- State Bar of Wisconsin



- Milwaukee Bar Association
- Wisconsin Retirement Plan Professionals
- Greater Milwaukee Employee Benefits Council