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Court Admissions
Court of Appeals of Maryland

Education
Catholic University of America, Columbus School of Law (J.D., 1974)

- Comments Editor, *Law Review*

University of Pennsylvania, Wharton School (M.B.A., 1968)

University of Pennsylvania (B.A., 1966)

TERRENCE M. FINN

Experience

Terrence M. Finn is engaged in a broad employee benefits practice, including documentation and compliance matters for qualified plans, employee stock ownership plans, tax sheltered annuities and government retirement plans. A large part of Terry's practice involves deferred compensation plans and the impact of the new federal tax law on those plans and comparable provisions in employment agreements. As part of his benefits practice, Terry advises clients on cafeteria plans and self-insured health and accident plans. He also defends attorneys and accountants in malpractice cases with respect to retirement and income tax matters.

Terry spent 11 years as director and senior counsel in the law department of a large broker-dealer. In that capacity, he advised business units on legal and regulatory issues arising from brokerage, advisory and retirement plan services of the broker-dealer. He also prepared plan documents, obtained approval from the Internal Revenue Service of traditional and Roth IRA prototype plans and advised the IRA Department on prohibited transaction questions and distribution issues.

Honoraries

- AV Rated, Martindale-Hubbell

Professional Background

- Law Clerk for Judge Alexander Harvey, U.S. District Court for the District of Maryland, 1974-1975

Publications & Presentations

- Author, "Severance Benefits- Avoiding the Impact of Internal Revenue Code Section 409A," *Section of Labor & Employment Law Newsletter*, Maryland State Bar Association, 2013
- Co-author, "New Regulations Regarding Disclosure of Plan and Fee Information ," Ober|Kaler Client Alert, 2011
- Author,Code Section 409A - Deferred Compensation and Severance Agreements, The IRS Provides a Second Chance ," Ober|Kaler Client Alert, 2010
- Co-author,The Importance of Maintaining Current Beneficiary Designations," *Planning for the Future Newsletter*, 2009