



Olivia R. Perry

ASSOCIATE

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Practice Areas

Multiemployer Benefit Plans

- Fund Administration & Operations
- Fiduciary Duties & Insurance Needs
- Withdrawal Liability
- Health & Welfare Plans
- Data Privacy & Cyber Compliance for Benefit Plans
- Tax Qualification / Audits
- Apprentice & Training Funds
- Mergers & Consolidations
- Dispute Resolution & Litigation

Admissions

State of Connecticut

Education

University of Connecticut
School of Law, J.D.

Indiana University Kelley
School of Business, B.S.

Overview

Olivia stands ready to assist multiemployer clients on all matters related to their employee benefit funds. Whether a client requires guidance in navigating the shifting legislative landscape surrounding ERISA, counsel on identifying and complying with the fiduciary duties that govern the day-to-day administration of an employee benefit fund, or assistance in researching and drafting responses to fund participant inquiries related to their benefits, Olivia's goal is to use her skills and wide variety of legal experience to work with her clients and achieve a well-rounded solution. She aims to work closely with her team, fund office staff, trustees, and other advisors to strengthen the future of employee benefits in the organized labor space.

While attending the University of Connecticut School of Law, Olivia served on the executive board of Lambda Law Society, and also participated in the Women Law Students' Association's mentorship program.

Representative Experience

- Drafted annuity and pension plan amendments addressing required and optional provisions of the SECURE 2.0 Act, as amended.
- Evaluated legislative guidance published by the Department of Labor, Department of Health and Human Services, and Internal Revenue Service, among others, for trustees and fund office staff.
- Clarified new benefit plan rules by preparing summaries of material modifications (SMMs) for distribution to plan membership.
- Oversaw the legal aspects of implementing new health and wellness initiatives at various multiemployer health benefits funds.
- Routinely reviews and advises on Qualified Domestic Relations Orders (QDROs) received by annuity and pension fund clients.
- Regularly assists fund office staff in responding to participant communications and inquiries.

Professional & Community Involvement

- Connecticut Bar Association
- Hartford County Bar Association
- International Foundation of Employee Benefit Plans

Honors & Awards

- During law school, Olivia received the CALI Excellence Award in the "Law, Consciousness, and Free Will" course, earned a certificate in Intellectual Property, and regularly participated in pro bono law clinics, providing legal advice to members of underserved communities.