



“I enjoy the challenges inherent in navigating the ever-changing tax laws that affect Qualified Retirement Plans.”

Katherine Glenn

301-951-9351
301-654-7354 FAX

kglenn@paleyrothman.com

For more than 40 years, Kathy has worked extensively as a paralegal in the field of Qualified Retirement Plans and is well respected in the area. Her depth of knowledge spans the life cycle of a retirement plan, from its inception to its termination, and includes assisting Paley Rothman lawyers in designing the appropriate plan for the client, preparing Plan documents based on the client’s decisions, keeping the plan in compliance with law changes, performing IRS-required discrimination testing, and eventually terminating the plan and effectuating IRA rollovers for plan participants. Kathy has developed many long-standing relationships with the firm’s clients and she values these relationships as well as those she has cultivated among attorneys and staff at Paley Rothman. Our team’s goal is not only to ensure that our clients’ Qualified Retirement Plans are written and operated in accordance with the law, but to provide timely and personal service. Kathy’s commitment to this goal means that clients know they can contact her at any time with questions or concerns and they will receive a timely response.

PRACTICE AREAS

Retirement Plans

Employee Benefits

EDUCATION

UNC Charlotte

James Madison University