SYNDICATE LEGAL ADVISORY SERVICES

LABOR & EMPLOYMENT

Syndicate Legal Advisory Services – *Labor & Employment*

SYNDICATE LEGAL ADVISORY SERVICES

Team of:
Attorneys / Lawyers
Law Clerks
Paralegals
Industry Specialists

- **ERISA (Employee Retirement Income Security Act):**
  - Conduct the initial review of Employees Claim(s) File
  - Create detailed Claim(s) File Summary
  - Assist during Settlement, Mediation, Arbitration and Trial
  - Draft Settlement Agreements (*if necessary*)

- **EEOC (Equal Employment Opportunity Commission):**
  - Investigate Discrimination Claims under Federal and/or State Statutes (including any Civil Rights Violations)
  - Assist during Trial, Arbitration, Grievance Hearings, and other Formal Proceedings for Grievance and/or Discharge
  - Assist during Trial, Arbitration, Grievance Hearings, and other Formal Proceedings for Grievance and/or Discharge
  - Assis with Drafting of Proposed Policies and Procedures with comply with related State, Federal, Local or Agency Employment Practice Regulations

- **National Relations Labor (NLRB) / Union Activity:**
  - Assist with Personnel Policies and Practices to avoid Unionization
  - Assist with Union-Avoidance Materials
  - Respond to matters under the National Labor Relations Act including responding to Petitions or Demands from a Union.
  - Assist with Unfair Labor Practice Charges with the NLRB
  - Assist with Documents necessary to prepare for and attend NLRB Trial / Arbitrations.
  - Respond to Union information and NLRB Requests.
  - Assist with handling problems during Strikes, including Draft Strike Manuals and Contingency Plans.

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- **Common Law Statute / Tort Claims:**
  - We have knowledge of Common Law Statute / Tort Claims
  - Assist with Wrongful Discharge and Employment-at-Will Claims
  - Assist with Contract and Promissory Estoppel Claims

- **Department of Labor & Employment:**
  - Assist with the Unemployment Insurance / Appeals Process
  - Assist with Hearing Preparation, issuance of Subpoenas and with Witness Preparation
  - Assist with Wage Claims regarding California Wage Claim Act or California Minimum Wage

- **EMPLOYMENT LITIGATION:**
  - Act as Liaison between:
    - Experts
    - Benefit Coordinators
    - Other Professionals
    - HR Professionals
    - Courts
    - Other Counsel
    - Clients
  - Deposition Scheduling & Preparation
  - Docketing & Tracking

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- Prepare for and assist at Trials, Court Mandated Conferences, Administrative Hearings, Settlement Conferences, Inspections, Arbitrations, Negotiation Sessions, and Internal Proceedings, including (but may not be limited to):
  - Orchestration of tasks related to Mediations, Arbitrations and Administrative Hearings
  - Prepare and Maintain Trial Exhibits
  - Coordinate the use of Electronic Trial Presentation Equipment, maintaining & tracking Exhibits, and scheduling witnesses.
  - Coordinate Witness Preparation & Testimony
- Perform Legal, General & Factual Research
- Draft Non-Dispositive Pleadings, Claims, Contracts, Motions, Correspondence and other necessary Documents
- Correspond with Courts, Parties, Attorneys, Organizations, Professionals / Experts, including treating Physician(s), Investigators, Witnesses and Governmental Agencies.
- Locate and Interview Witnesses and Expert Witnesses
- Collect Factual Information, using Public Records and other Online Resources
- Arrange for Service of Process of Complaints and Subpoenas, both in-state and foreign
- Preparation and Filing of Legal Briefs with the Court
- Compile and Maintain Documents, utilizing Databases & Spreadsheets
- Review Documents for Privilege & Relevance
- Obtain & Summarize Medical (and other) Records
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EMPLOYMENT NON-LITIGATION

- Draft Employee Plans for Attorney Review:
  - Act as Liaison between Plan Sponsor, Plan Administrator, and Trustee in Preparing and Drafting Qualified Employee Plans, *i.e.:*
    - Stock Bonus Plans;
    - Profit Sharing Plans;
    - Purchase Money Pensions and other Pension Plans;
    - Trust Agreements
    - Individual Retirement Account (IRA) Plans;
    - Annuity Plans;
    - HR-10 or Keogh Plans;
    - Employee Stock Ownership Plans;
    - Life & Health Insurance Plans;
    - Workers' Compensation Plans; and
    - Social Security Plans
  - Assist with Document Preparation & Program Monitoring:
    - Gather Information
    - Determine Eligibility for Participation and Benefits
    - Notify Employees of Participation
    - Complete Input Forms for Document Assembly
    - Assemble Elections to Participate
    - Determine Beneficiary Designations
    - Record Elections to Contribute
    - Allocate Annual Contributions to Individual Participants' Accounts
    - Prepare Annual Account Statements for Participation

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- Identify any potential Discrimination Problems with Program
- Prepare Plan and Trust Documents for IRS Approval (*including any relevant IRS Forms*)
- Prepare Summary Plan Description and other Reporting & Disclosure Forms, including Form 5500 Annual Reports (U.S. Dept. of Labor)
- Prepare other applications for submission to IRS, Pension Benefit Guaranty Corporation, and Department of Labor regarding Plan Termination and Requests for Approval.
- Maintain Document Forms, Government Forms, and Library of Plan Documents
- Assist Attorney in Preparing, Finalizing, and Filing Documents and Reports required by Federal, State and Local Laws
- Additional:
  - Assist in Drafting Summary Plan Descriptions for Distribution to Employees
  - Help Prepare & Review Annual Reports of Plans

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