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Areas

- Employee Benefits
- Corporate
- Nonprofit Entities & Tax-Exempt Organizations

Education

- University of Tennessee College of Law (J.D., with honors, concentration in business transactions, 2003)
- Appalachian State University (B.S.B.A. with major in accounting, 1995)

Admissions

- North Carolina, 2006
- Tennessee, 2003
- Certified Public Accountant - Licensed in North Carolina in 1997

Jon provides employee benefit plan consulting services related to retirement plans, nonqualified deferred compensation and other executive compensation arrangements, and health and welfare plans. His consultation includes plan design, plan compliance and correction, plan restatement, plan termination and negotiations with the Internal Revenue Service and the Department of Labor related to plan compliance, correction, and plan audits. He also assists clients in all areas of transactional and tax matters relating to for profit and exempt organizations.

Representative Transactions

- Represented local company in negotiating the correction of numerous retirement plan documentation and operational compliance errors through the voluntary compliance programs sponsored by the Internal Revenue Service and the Department of Labor.
- Represented company in negotiations with Internal Revenue Service regarding the company's welfare plan, its participation in a listed transaction and related penalties.
- Counseled closely-held company regarding various options for providing phantom equity and deferred compensation benefits to top management employees in lieu of actual stock ownership, and drafted related documentation.
- Represented closely-held retail chain in \$275 million+ asset sale of 80+ locations to publicly-traded acquirer, concentrating on retirement and welfare benefit issues relating to sale.

Honors and Awards

- North Carolina Super Lawyers - Employee Benefits/ERISA (2017 - 2019); Rising Star for Employee Benefits/ERISA (2013 and 2012)

Professional Affiliations

- American Bar Association (Employee Benefits Committee)
- Southeast Benefits Education Network (Membership Committee)
- Past President and Board Member, Charlotte Benefits Forum
- American Institute of Certified Public Accountants

Community Involvement

- Has been or is active in a number of civic, social, and cultural organizations.