

About Us

Our Philosophy -

ERISA's reporting and disclosure rules for health and welfare plans are intended to establish that important balance between the employer and the employee: the employee's rights to know his or her benefits and the employer's rights to rely on a uniform body of Federal law, with all its advantages. Yet, the constantly changing laws in this area can seem daunting for an employer trying to stay in compliance.

ERISA *Pros* is focused on providing a proactive "Best Practices" system that helps an employer get into compliance and stay there. To do this we are constantly and rigorously training our staff in this concentrated area. It's our promise to be *the best* at what we do, *period*.

Good experience is a great teacher, and our founder, Bernard Kears, has a great deal of it. He is personally involved in staff training and expects them to *love* knowing their stuff. His philosophy can be summed up as follows:

"The *Wrap-Tight*sm System is to be the 'gold standard' of compliance. If that's what our clients say about us, then we've done our job."

Anne H. Whipple, JD -

Anne Whipple has over twelve years of professional legal experience, bringing to ERISA *Pros*, LLC her expertise, including insurance defense litigation, which required a thorough understanding of legal issues and analysis of complex transactions.

She earned her Juris Doctor from the University of Georgia School of Law in May 1995.

Bernard V. Kears, III, JD, LLM

Bernard Kears founded ERISA *Pros* to assist employers with the complexities of ERISA reporting and disclosure compliance requirements for health and welfare benefit plans.

Mr. Kears has focused on ERISA for over twenty-five years and has designed, drafted and reviewed virtually every type of employee benefit plan, representing both public and private companies. His work experience includes acting as Employee Benefits Counsel for a Fortune 200 company, as well as practicing law with two national firms and a boutique corporate merger and acquisition firm before forming his own law firm over fifteen years ago.

His health and welfare plan experience includes prior representation of a major insurance company, providing assistance and advice on various ERISA welfare benefit matters, including proper drafting for administrative service only (ASO) agreements for self-funded medical arrangements. He has also been engaged as an expert witness and acted as Employee Benefits Counsel in pension and welfare litigation cases.

Honors/Distinctions -

- Bar Register of Preeminent Lawyers (Martindale-Hubbell Law Directory)
- Fellow of The American Bar Foundation (Limited to 1/3 of 1% of the attorneys in America)
- Fellow of The American College of Employee Benefits Counsel, Inc. (Charter Member)
- Supervisory Council member of the Real Property, Trust and Estate Law Section of the American Bar Association
- Former Chair of the Employee Benefits Committee of the Real Property, Trust and Estate Law Section of the American Bar Association
- Former Chair of the ESOP Committee of the Real Property, Trust and Estate Law Section of the American Bar Association
- Former member of the Pension Advisory Board to the State of Georgia Department of Human Resources

Education -

- Wofford College, *magna cum laude*, Phi Beta Kappa
- University of South Carolina, JD (Law Review Editor)
- University of Miami, LLM (Masters in Law)

Professional Affiliations -

American Bar Association
Georgia State Bar Association
Illinois State Bar Association
South Carolina State Bar
Virginia State Bar Association
Member, Court of Appeals, Eleventh Circuit

Anne, a member of the National Association of Chinese Americans, is fluent in Mandarin Chinese.

Ms. Whipple is a member of the State Bar of Georgia, Fiduciary Section, and is admitted to the Federal Court of the Northern and Middle Districts of Georgia and Eleventh Circuit Court of Appeals.

Anne's personal interests include yoga, Chinese language studies, digital photography, listening to NPR podcasts and, of course, keeping up with her two children.