



SYNDICATE
SUBSCRIPTION LEGAL PLANS

Labor & Employment

Syndicate Subscription Legal Plans – *Labor & Employment*



SYNDICATE LEGAL 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

SYNDICATE LEGAL & FINANCIAL

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