Snell & Wilmer

Anne M. Meyer

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Main Bio

Anne Meyer's practice is concentrated on employee benefits and executive compensation, including compliance with the requirements of the Internal Revenue Code and the Employee Retirement Income Security Act of 1974 ("ERISA"). Anne has more than 20 years of experience in counseling private and public companies and nonprofit organizations on all aspects of employee benefits including Section 401(k) and defined contribution plans, defined benefit and cash balance plans, equity compensation programs, and nonqualified and deferred compensation arrangements, including issues relating to Section 409A deferred compensation rules. Anne's practice also includes advising clients on health and welfare arrangements, fringe benefit programs and employee benefit and executive compensation matters related to corporate mergers and acquisitions. She also routinely advises clients on ERISA fiduciary and prohibited transaction matters and represents clients before the IRS, DOL and PBGC on matters related to employee benefits.

Anne is a contributor to Snell & Wilmer's SW Benefits Blog, which offers analysis and commentary on employee benefits and executive compensation matters.

Representative Matters

- Drafted equity plans for publicly traded energy and technology companies
- Represented a variety of clients in the amendment, freezing, merger, partial termination and termination of retirement plans
- Assisted clients in their correction of plan errors including preparing applications under the IRS's and DOL's correction programs and negotiating settlements under such programs
- Advised both publicly held and privately held clients regarding employee benefits and executive compensation issues in mergers and acquisitions, acting as counsel to both buyers and sellers
- Assisted public and private companies with correction of plan document and administrative errors relating to Section 409A of the Internal Revenue Code
- Advised clients on negotiation and drafting employment and severance agreements with senior executives of publicly and privately held companies and non-profit organizations
- Advised on administrative rules governing qualified tuition program under Section 529 of the Internal Revenue Code
- Advised and trained clients on ERISA fiduciary duties and assisted ERISA fiduciaries with the review and negotiation of investment manager, investment adviser and consulting agreements

- Drafted and reviewed policies and procedures related to qualified domestic relations orders for defined benefit and defined contribution plans and advised clients on issues related to the implementation and qualification of domestic relations orders

Education

- University of Iowa College of Law (J.D., with distinction)
  - Writer and Symposium Editor, Journal of Transnational Law and Contemporary Problems
- University of Iowa, Bordeaux Comparative Law Program (Arcachon, France)
- Loras College (B.A., Business, Physical Education, maxima *cum laude*)

Professional Memberships & Activities

- State Bar of Arizona
  - Tax Section
    - Chair (2020-2021)
    - Chair Elect (2019-2020)
    - Budget Officer (2017-2018)
    - Secretary (2016-2017)
    - Executive Council, Member at Large (2014-2016)
    - Seminar Chair, State Bar of Arizona Annual Convention (2013)
- American Bar Association
  - Section of Taxation
    - Joint Counsel on Employee Benefits meeting with IRS and Treasury, Scrivener (2007-2018)
    - Employee Benefits Committee's Distributions Subcommittee, Chair (2015-2018), Vice-Chair (2012-2015)
    - Employee Benefits Committee's Defined Benefit Subcommittee, Young Lawyer Liaison (2007-2009)
- Western Pension and Benefits Council, Phoenix Chapter
  - President (2013-2014)
  - Secretary (2008-2009)
  - Board Member (2007-2017)
- TE/GE Council
  - Pacific Area Member (2015-Present)

Representative Presentations & Publications

- "Third Time's a Charm? The Department of Labor Releases Its Third Iteration of the Fiduciary Rule," Co-Author, Snell & Wilmer Legal Alert (April 29, 2024)
- "Employee Benefits Unveiled: Crucial Compliance Nuggets You Didn't Know You Needed," Co-Presenter, Western Pension and Benefits Council 2024 Spring Conference (April 11, 2024)
- "401(K) Best Practices," Presenter, PNC Institutional Asset Management (November 14, 2023)

- "SECURE 2.0 - Where are We Now?", Speaker, ABA Virtual 2023 Fall Tax Meeting (October 16, 2023)
- “Changes to Self-Corrections and Recovery of Overpayments” Presenter, Snell & Wilmer Virtual CLE Series (June 13, 2023)
- "Qualified Plan Issues in Corporate Transactions” Presenter, ABA Joint Committee on Employee Benefits, 2023 Employee Benefits in Mergers & Acquisitions National Institute (May 23, 2023)
- Practitioner’s Panel, Joint TE/GE Council Employee Plans Annual Meeting (February 24, 2023)
- "New SEC & Executive Compensation Developments," Presenter, Association of Corporate Counsel CLE (January 17, 2023)
- "2023 End of Year Plan Sponsor “To Do” List (Part 4) Executive Compensation," Co-Author, SW Benefits Update (December 15, 2023)
- "2023 End of Year Plan Sponsor “To Do” List (Part 3) Qualified Retirement Plans," Co-Author, SW Benefits Update (December 1, 2023)
- "2023 End of Year Plan Sponsor “To Do” List (Part 2) Annual Cost of Living Adjustments," Co-Author, SW Benefits Update (November 29, 2023)
- "2023 End-of-Year Plan Sponsor “To Do” Lists (Part 1) Health and Welfare," Co-Author, SW Benefits Update (October 10, 2023)
- "SW Benefits Update - 2022 End of Year Plan Sponsor “To Do” List (Part 4) Executive Compensation, " Co-Author, SW Benefits Update (December 19, 2022)
- "SW Benefits Update - 2022 End of Year Plan Sponsor “To Do” List (Part 3) Qualified Retirement Plans," Co-Author, SW Benefits Update (December 2, 2022)
- "SW Benefits Update - 2022 End of Year Plan Sponsor “To Do” List (Part 2) Annual Cost of Living Adjustments," Co-Author, SW Benefits Update (November 17, 2022)
- "SW Benefits Update - 2022 End of Year Plan Sponsor “To Do” List (Part 1) Health and Welfare," Co-Author, SW Benefits Update (October 12, 2022)
- "Data Privacy and Cybersecurity," Presenter, Snell & Wilmer Virtual CLE Series (June 1, 2021)
- "To Err is Human, To Forgive is Up to the IRS," Presenter, Western Pension & Benefits Council, Phoenix Chapter, 2021 Spring Conference (May 19, 2021)
- "Biden DOL Will Allow Fiduciary Rule Rewrite to Take Effect (1)," Quoted, Bloomberg Law (February 12, 2021)
- “Executive Compensation Update: CARES Act, Incentive Compensation, Tax Cuts and Jobs Act – Section 162(m),” Presenter, Thirteenth Annual Proxy Season Update Webinar (January 7, 2021)
- “ERISA Fiduciary Training,” Presenter, Members of ERISA Fiduciary Employee Committee, HR Department and Legal Team of an Arizona-Based Health Care Provider (December 4, 2020)
- "With a New Administration, Will the Department of Labor’s Fiduciary Rule Once Again be Revised?" Author, SW Benefits Blog (November 20, 2020)
- “ERISA Fiduciary Training,” Presenter, Members of ERISA Fiduciary Employee Committee, HR Department and Legal Team of an Energy Holding Company (August 2020)
- “Dollars and Cents: Fees Matter – ERISA Fiduciary Update,” Presenter, Snell & Wilmer’s 2020 Year-End CLE Series: Virtual Edition (August 20, 2020)
- “ERISA Fiduciary Training,” Presenter, Members of ERISA Fiduciary Employee Committee, HR Department and Legal Team of an Electric Utility Company (May 2020)

- "CARES Act Provides Funding Relief for Single Employer Pension Plans," Author, SW Benefits Update (March 27, 2020)
- "It CARES Act and Defined Contribution Plans: A Brief Summary for Plan Sponsors," Author, SW Benefits Updates (March 27, 2020)
- “Executive Compensation Update,” Presenter, Twelfth Annual Proxy Season Update (January 9, 2020)
- "IRS Publishes 2019 Required Amendments List," Co-Author, SW Benefits Blog (December 16, 2019)
- “Distribution Dilemmas: Loans and Hardships,” Presenter, Western Pension & Benefits Council, Phoenix Chapter (November 14, 2019)
- “Dollars & Cents: Fees Matter,” Presenter, CBIZ Seminar Series (November 5, 2019)
- “Emerging Trends in Employee Benefit Plan Design and Administration,” Speaker, ABA TIPS Mid-Winter Symposium on Insurance and Employee Benefits (January 2018)
- “Employee Benefits Deferred Benefit Plans and Distributions Update,” Panelist, 2017 ABA Section of Taxation Joint Fall Meeting (September 2017)
- “Employee Benefits Deferred Benefit Plans and Distributions Update,” Panelist, 2017 ABA Section of Taxation Midyear Meeting (February 2017)

Professional Recognition & Awards

- The Best Lawyers in America®, Employee Benefits (ERISA) Law (2019-2024)
- AZ Business Leaders, AZ Business Leaders Magazine (2020, 2022)
- Chambers USA: America's Leading Lawyers for Business®, Employment & Labor (2019); Employee Benefits (2020-2023)
- Southwest Super Lawyers®, Employee Benefits (2022, 2024)
    - Rising Stars Edition, Employee Benefits/ERISA (2012-2016)
- Nolan Fellow, American Bar Association Section of Taxation (2009)

Community Involvement

- National Charity League (2022-Present)
- Assistance League of Phoenix, Advisory Council
- UMOM New Day Centers, Inc., Board of Directors (2012-2018)
- Iowa Law School Foundation, Class Agent
- Valley Leadership Institute, Class 33

Bar Admissions

- Arizona

Court Admissions

- Supreme Court of Arizona
- United States District Court, District of Arizona

Client News

- Snell & Wilmer Advises Digital Enablement Solutions Provider AVI-SPL in Acquisition of Adtech

- Snell & Wilmer Represents Home Owner Association Management Company RealManage in Strategic Partnership with American Securities