



Morgan Lewis

WHY CHOOSE US?

Presentation to the STRS Ohio Board's Ad Hoc Governance Committee

June 14, 2023

Joseph Zargari
Julie Stapel

© 2023 Morgan, Lewis & Bockius LLP

Service Is Our Culture



BTI CLIENT SERVICE 30

AMONG THE TOP LAW FIRMS
FOR 20 CONSECUTIVE YEARS
(2002–2022)



MOST PRESTIGIOUS LAW FIRMS

VAULT GUIDE TO TOP 100 LAW FIRMS
(2014–2022)



TOP 20

GLOBAL ELITE LAW FIRM BRAND INDEX
ACRITAS
(2021)



400+ LAWYERS RECOGNIZED

CHAMBERS & PARTNERS
(2023)

Select Accolades



Dedicated to Being as Diverse as the World We Serve

- At Morgan Lewis, we know that moving the needle on diversity and inclusion (D&I) takes purposeful effort, consistency, and communication. We are dedicated to D&I not only because it is the right thing to do, but also because it is integral to how we do business.
- D&I influences how we service clients, collaborate with colleagues, and recruit, retain, and promote the firm's lawyers and legal professionals around the globe.

Morgan Lewis

- Morgan Lewis is one of the world's largest law firms chaired by a woman. Chair Jami McKeon was selected to her second five-year term in 2018
- Our labor and employment practice, comprising more than 250 lawyers, is led by a Black woman
- 50% of our Advisory Board members are diverse
- 64% of the 2020 partnership class is diverse
- 47% of office managing partners are diverse
- 40% of firmwide practice leaders are diverse
- 39% of the firm's partners are diverse
- 60% of our 2021 summer associates are persons of color or identify as LGBTQ+

We Understand Public Plans

- We have consistently sought out public fund clients and devoted ourselves to best-in-class services to these plans.
- We work with public plans at the state, county, and local levels across the country.
- We understand how public plans are different from private-sector plans.
- We invest our own time to become familiar with the laws applicable to our public plan clients so that our advice is responsive to those laws.

We Understand Public Plan Board Governance

- We have conducted governance reviews for other public plan boards and will be able to on-board STRS Ohio efficiently.
- We will work with you to develop governance structures and policies, responsive to your specific needs as identified in the audit, with a focus on structures and policies being practical and implementable.
- We implement large-scale, long-term fiduciary governance initiatives, including multiyear fiduciary calendars and governance “report cards.”
- We strive to be candid, practical and proactive—and focused exclusively on enabling our board client to satisfy its fiduciary obligations.

We Understand Presenting to Public Plan Boards

- We routinely make presentations to public plan boards.
- Board meeting time is precious and we tailor our presentations to focus on the most relevant issue for the board's collective consideration.
- We work closely with board staff in advance of meetings to make sure our presentation and our materials meet the board's needs.
- We take the time to learn the public records and disclosure laws applicable to a public plan board and consider them in developing our presentation materials.
- We do not just create governance structures and walk away. We attend board meetings to help apply those structures in real time.

Meet the Team



Craig A. Bitman

New York

+1.212.309.7190

craig.bitman@morganlewis.com

Craig Bitman provides clients with a range of knowledge and skills in all aspects of employee benefits and executive compensation law, and he also practices in the firm's institutional investor and private investment funds practices. Craig leads the firm's employee benefits and executive compensation practice, has served as a member of the firm's Advisory Board, and currently co-leads the firm's Disability Awareness Lawyers Network.

Morgan Lewis

Meet the Team



Julie K. Stapel

Chicago

+1.312.324.1113

julie.stapel@morganlewis.com

Julie Stapel provides effective and practical solutions to clients' complex employee benefit plan issues. She proficiently steers plan fiduciaries through fiduciary and prohibited transaction rules and negotiates virtually every type of investment-related agreement with employee benefit plans. Julie uses exceptional communication and interpersonal skills to advise clients on a wide range of topics, including effective fiduciary governance, risk management, the creation of "white label" investment options, and the application of environmental, social, and governance (ESG) factors in plan investment decision-making.

Morgan Lewis

Meet the Team



Joseph D. Zargari

New York

+1.212.309.7020

joseph.zargari@morganlewis.com

Joseph Zargari focuses on the private investment fund industry, including the structuring, formation, governance, and regulation of and investment in US and non-US hedge funds, private equity funds, venture capital funds, managed accounts, and other products. In addition, Joe has a significant practice representing buyers, sellers, and general partners in secondary transactions (including portfolio sales of fund interests and GP-led transactions). He also provides legal, regulatory, and transactional advice for investment managers and institutional investors. Joe is the practice group leader for the New York office investment management practice.

Meet the Team



Yongo advises clients on the design, operation, and compliance of qualified retirement plans and counsels on the legal issues arising under ERISA, the Internal Revenue Code, the Affordable Care Act, and HIPAA.

Yongo Ding
Associate



Gena advises plan sponsors and administrators on fiduciary governance and negotiation of investment-related agreements for private equity, hedge, and collective investment funds.

Gena Yoo
Associate



Theresa has experience working on the design, administration, and compliance of qualified pension, profit-sharing, 401(k), and welfare benefit plans, as well as in analyzing the employee benefit aspects of mergers and acquisitions

Theresa Gomez
Senior Benefit Advisor

THANK YOU

© 2023 Morgan, Lewis & Bockius LLP
© 2023 Morgan Lewis Stamford LLC
© 2023 Morgan, Lewis & Bockius UK LLP

Morgan, Lewis & Bockius UK LLP is a limited liability partnership registered in England and Wales under number OC378797 and is a law firm authorised and regulated by the Solicitors Regulation Authority. The SRA authorisation number is 615176.

Our Beijing and Shanghai offices operate as representative offices of Morgan, Lewis & Bockius LLP. In Hong Kong, Morgan, Lewis & Bockius is a separate Hong Kong general partnership registered with The Law Society of Hong Kong. Morgan Lewis Stamford LLC is a Singapore law corporation affiliated with Morgan, Lewis & Bockius LLP.

This material is provided for your convenience and does not constitute legal advice or create an attorney-client relationship. Prior results do not guarantee similar outcomes. Attorney Advertising.