# Peter Gulia—Fiduciary Guidance Counsel

Peter Gulia counsels people who manage retirement plans, retirement-services providers, and investment advisers. His 36 years of experience includes 21+ years' experience from 1984 through 2005 with one of America's largest retirement-services businesses. From 2006, his recent 15 years' law practice continues to include employee-benefits law and investment-adviser regulation. Peter Gulia is in Thomson Reuters' *Super Lawyers* for 2015-2021.

Peter's focus is counseling fiduciaries of all kinds. Beyond advising a retirement plan's lead fiduciary, Peter counsels investment managers and advisers about their fiduciary duties and compliance procedures. Peter advises lawyers, actuaries, and certified public accountants about their professional conduct. Peter works with all sizes, from S&P 500 companies to a firm with one owner-operator. Peter is counsel to States' attorneys general and other officials.

Since 1994, Peter has published primarily with Wolters Kluwer Law & Business; he is a contributing author of six books in its Answer Book series, of ERISA: A COMPREHENSIVE GUIDE, and for *401(k) Advisor*, a monthly. With other publishers, Peter is a Bloomberg Insights author, and is a coauthor of THE CPA'S GUIDE TO RETIREMENT PLANS FOR SMALL BUSINESSES (AICPA). Peter is the author of ERISA FIDUCIARY RESPONSIBILITY and PROFESSIONAL CONDUCT IN TAX PRACTICE.

Peter Gulia is an adjunct professor of Temple University's Beasley School of Law, teaching its ERISA Fiduciary Responsibility course and its Professional Conduct in Tax Practice course, speaking in its employee-benefits public policy course, and supporting other tax and employee-benefits instruction, including for J.D., LL.M., and M.S.T. students. Peter also is a member of Temple Law's Center for Tax Law and Public Policy.

Peter has taught and teaches a range of professional-education programs for the American College of Financial Services, American Law Institute, American Society of Pension Professionals and Actuaries, Association of Legal Administrators, Federal Bar Association, Fi360, Insured Retirement Institute, Investment Company Institute, National Association of Personal Financial Advisors, Worldwide Employee Benefits Network, and many other associations.