



**PETRA J. BRADBURY**

Associate

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## SERVICES



Business Succession  
Closely Held & Family-Owned Businesses  
ESOPs (Employee Stock Ownership Plans)  
Employee Benefits & ERISA

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## EDUCATION

University of Virginia School of Law, J.D.  
George Mason University, B.S.

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## LICENSED TO PRACTICE

Ohio  
U.S. District Court, Northern District of Ohio

## OVERVIEW

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Petra is an associate in Walter Haverfield's Business Services group located in Cleveland, Ohio. She specializes in employee benefits and deferred compensation plans. She has counseled clients extensively regarding qualified retirement and welfare benefit plans, including design, implementation, IRS correction programs, and employee benefit issues related to corporate acquisitions, mergers and dispositions. Prior to joining Walter Haverfield, Petra was a corporate counsel for Charles Schwab and, earlier, vice president and assistant counsel for KeyBank in the Employee Benefits Trust area. Petra began her legal career as an associate with the Cleveland law firm Thompson Hine LLP.

## EXPERIENCE

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### EMPLOYEE BENEFITS

- Advises clients on all aspects of qualified plan and welfare plan design, IRS and ERISA compliance, and plan administration matters.
- Provides due diligence regarding employee benefit matters for clients in mergers and acquisitions.
- Drafts plans, amendments and restatements for both qualified plans and welfare plans, including plan design changes and changes in applicable law.
- Prepares and submits numerous VCP filings involving many complex and novel errors, and negotiates compliance statements with the IRS.
- Assists clients in implementing the corrections required under compliance statements issued by the IRS.
- Advised clients regarding termination of profit sharing, 401(k) and pension plans, obtained favorable determination letters from the IRS on the terminated plans, and assisted in the annuity purchase process for a terminated pension plan.