



Patricia A. Shlonsky

Partner | Partner-in-Charge, Cleveland

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Cleveland - 216.583.7012

Patty serves as Partner-in-Charge of UB Greensfelder's Cleveland office guiding development, client service, business, and operations efforts. With more than 30 years of experience, Patty's practice focuses on assisting clients in the establishment, qualification, and maintenance of all types of employee benefit plans. She advises clients regarding employee benefit compliance issues, benefits issues which arise in mergers and acquisitions, privacy and data security issues under HIPAA, health benefits, executive compensation, and represents clients involved in governmental and private dispute resolution. Patty also has comprehensive experience handling all types of ERISA litigation. She has achieved the highest ranking, AV Preeminent®, from Martindale-Hubbell®, and is ranked as one of Ohio's leading Employee Benefits and Executive Compensation lawyers by Chambers USA and is named to *The Best Lawyers in America*® in Employee Benefits Law.

Education

- Miami University (B.A., 1981)
- The Ohio State University Moritz College of Law (J.D., *with honors*, 1984)

Bar Admissions

- Ohio
- U.S. Supreme Court
- U.S. Tax Court
- U.S. Court of Appeals, Sixth Circuit
- U.S. Court of Appeals, Seventh Circuit
- U.S. District Court, Northern District of Ohio
- U.S. District Court, Southern District of Ohio
- U.S. District Court, Eastern District of Michigan

Professional Affiliations

- American Bar Association

Practices & Industries

- Employee Benefits
- Employee Benefits & ERISA Litigation
- Executive Compensation
- Tax
- Financial Services Regulatory
- Health Care
- Business Law
- Data Privacy & Cybersecurity
- Retail, Restaurant & Hospitality
- Health Care & Regulated Industries
- Manufacturing
- Employee Benefits / ERISA
- Audits & Investigations
- Health & Welfare Plans
- Plan Liabilities & Pitfalls
- Plan Termination & De-Risking
- Qualified Plans
- Tax-Exempt Organizations

- Ohio State Bar Association
- Cleveland Metropolitan Bar Association
- WEB (Worldwide Employee Benefits)
- American College of Employee Benefits Counsel (*Fellow*)
- American Society of Pension Professionals and Actuaries Benefits Council of Cleveland (*Former Vice President and Trustee*)

Firm Involvement

- Partner-in-Charge, Cleveland Office
- Member, Governing Board

Awards & Honors

- Ranked as one of Ohio's "Leaders in Their Field" in Employee Benefits & Executive Compensation by Chambers USA: America's Leading Lawyers for Business (2007-2026)
- Recipient of Ohio State Bar Foundation's Ramey Award for Distinguished Community Service (2025)
- Named to *The Best Lawyers in America*®, Employee Benefits (ERISA) Law; Litigation – ERISA (2003-2026)
- Named *Best Lawyers*® Litigation – ERISA "Lawyer of the Year" in Cleveland (2025)
- Named *Best Lawyers* "Lawyer of the Year" in Cleveland in Employee Benefits (ERISA) (2015; 2017; 2021)
- Named to the Ohio Super Lawyers list (2004-2009; 2011-2026)
- Recognized by Super Lawyers as one of the Top 100 Lawyers in Ohio, one of the Top 50 Female Lawyers in Ohio, and one of the Top 25 Female Lawyers in Cleveland (2013; 2014; 2016; 2021-2025)
- Named *Ohio Business Magazine's* Ohio Leading Lawyers (2024; 2025)
- Named to The Cleveland 500, *Cleveland Magazine's* listing of the most powerful and influential people in the community (2021-2026)
- "Notable Women in Law," *Crain's Cleveland Business* (2018; 2024)
- Recipient of ORT America's Jurisprudence Award (2023)
- Ohio State Bar Association Nettie Cronise Lutes Award (2022)
- Named to the Cleveland Jewish News list of "18 Difference Makers" (2021)
- YWCA Women of Achievement Award Recipient (2020)
- "Women of Note" Award Recipient, *Crain's Cleveland Business* (2017)
- Named a "Woman Worth Watching" by *Profiles in Diversity Journal* (2016)
- Lexology Client Choice Award (2016)
- AV Preeminent® Peer Review Rated – Martindale-Hubbell
- Named a "Top Lawyer" by *Northern Ohio Live Magazine* (August 2003)

Experience

- Assists clients in understanding their obligations and avoiding costly penalties through guidance and interpretation of the Patient Protection and Affordable Care Act.
- Represents clients in connection with establishment, qualification and consultation regarding all types of employee benefit plans, including 401(k), employee stock ownership plans, defined benefit plans, and nonqualified deferred compensation.
- Represents clients in connection with all types of employee benefit compliance issues and governmental and private dispute resolution.
- Represents clients in all types of ERISA litigation.
- Represents clients in connection with establishment, consultation, and termination of executive compensation.
- Represents clients in connection with legal issues affecting medical and other welfare benefits.
- Counsels clients regarding benefits issues in mergers and acquisitions.
- Counsels fiduciaries in connection with ERISA obligations.
- Represents clients in connection with HIPAA privacy and data security compliance.
- Provides counsel to clients with regard to distribution planning in connection with individual retirement accounts and qualified plan assets.
- Experience in handling government audits.
- Represents businesses of all sizes, fiduciaries, insurers and financial providers in connection with all types of ERISA issues on a regular basis.
- Represents clients in connection with litigation brought by governmental entities and employers and fiduciaries in connection with all types of ERISA litigation, including routine claims for benefits, breach of fiduciary duty claims, wrongful termination of employment for purposes of denying employee benefits (510 claims), COBRA disputes and defending employers against multiemployer benefit plan claims.
- Extensive experience regarding virtually all aspects of employee benefits and ERISA, including counseling clients with respect to the design and establishment, maintenance, modification, merger, spin-off and termination of all types of employee pension and welfare benefit plans, including profit-sharing, 401(k) and pension plans, employee stock ownership plans (ESOPs), 403(b) annuities, cafeteria plans, self-insured medical plans and medical reimbursement programs, disability plans and voluntary employee beneficiary associations (VEBAs); drafting of governing and support documents and administrative forms; preparation of appropriate filings with governmental agencies, including the Internal Revenue Service, U.S. Department of Labor and Pension Benefit Guaranty Corporation, relating to such matters as plan qualification, tax-exempt status, plan mergers and plan termination; advising with respect to operational and administrative issues relating to such matters as nondiscrimination testing, anti-cutback issues, plan distributions, participant loans, investment direction, qualified domestic relations orders, prohibited transactions, fiduciary responsibility, and COBRA and HIPAA compliance; analysis of controlled group and affiliated service group status; and representing clients in audit controversies with the Internal Revenue Service and U.S. Department of Labor.
- Assists clients in obtaining Employee Plan Compliance Resolution System (EPCRS)

Compliance Statements and in seeking private letter rulings, advisory opinions, and prohibited transaction exemptions with respect to proposed transactions.

- Past client representations include: assisting state-wide nursing home organization in obtaining retroactive tax exemption for health plan VEBA; assisting Fortune 500 company with HIPAA compliance; assisting publicly traded entity with all retirement plan issues, including employer stock held in 401(k) plan; assisting insurers and self-insured employees in connection with health and welfare disability claims, defending service providers in breach of fiduciary duty claims, defending insurers and self-insured employers in welfare benefit claims, defending administrators in COBRA disputes and defending employers in ERISA 510 claims.

Community Involvement

- Planned Parenthood of Greater Ohio (*Secretary, Board of Directors, 2024 - present*)
- Cuyahoga County Public Library (*Board Member; President, Board of Trustees, 2018-2020, 2026*)
- The City Club of Cleveland (*Vice President, Board of Directors; Co-Chair, Program Committee, 2017-2024*)
- Bellefaire JCB (*Board Member*)
- United for Libraries (*Trustee*)
- The Cleveland Jewish Community Federation (*Member, Retirement Fund Committee 2016-present*)
- Planned Parenthood Advocates of Ohio (*Board of Directors, 2020 - 2023*)
- BVU: The Center For Nonprofit Excellence (*Former Board Member*)
- The Center for Community Solutions (*Former Vice Chair, Board of Directors; Former Chair, Policy & Program Advisory Committee; Board of Directors, 2012-2020*)
- Leadership Cleveland (*Member, Class of 2012*)
- Cuyahoga County Public Library Foundation (*Board Member, 2008-2016*)
- College Now (*Former Board Member*)
- Dress for Success Cleveland (*Board Member 2003-2011; Past Board Chair 2005-2008*)

Publications & Presentations

PUBLICATIONS

- Retirement Plan Relief Provided by the CARES Act," Client Alert (April 2020)
- "DOL Seeks to Clarify Fiduciary Rule Timing With Temporary Enforcement Policy," Client Alert (March 2017)
- "U.S. Supreme Court Upholds Key Provisions of the Affordable Care Act," Client Alert (June 2015)
- "IRS Amendments to Prohibit Lump-Sum Windows for Retirees Already Receiving Annuity Payments," Client Alert (July 2015)

- “Trends in Health Care and Pension Benefits,” Chapter Author, Recent Changes in Employee Benefits and Executive Compensation, 2014 ed.: Leading Lawyers on Understanding ERISA Changes, Navigating Disclosure Guidelines, and Designing Compliance Strategies, *Thomson Reuters Aspatore* (April 2014)
- “Female Powerbrokers Q&A: Ulmer & Berne's Patty Shlonsky,” *Law360* (January 2014)
- “Sixth Circuit Says Severance Payments Not Subject to FICA,” Client Alert (October 2012)
- “Summary of Benefits and Coverage (SBC) for Insured and Self-Insured Group Medical Plans Required Commencing,” Client Alert (September 2012)
- “Department of Labor Provides Additional Guidance for Compliance with Looming Fee Disclosure Requirements,” Client Alert (August 2012)

PRESENTATIONS

Plan Design & Compliance

- “So Your Plan is Being Audited by the Government - What Now?,” American Society of Pension Professionals & Actuaries/ABC Cleveland (April 2021)
- “So Your Plan is Being Audited by the Government - What Now?,” Conference of Consulting Actuaries' Annual Meeting (October 2020)
- “Benefit Plan Changes in Light of COVID-19,” Webinar (June 2020) Cleveland Fiduciary Summit (August 2019)
- “Hidden Traps of Employment and Severance Agreements: Employee Benefits and Tax Concerns,” 54th Annual Midwest Labor and Employment Conference (October 2017)
- “DOL Fiduciary Rule and the Futures and Derivatives Industry,” Midland IRA and Ulmer DOL Fiduciary Rule Seminar (August 2017)
- “Rules of Engagement: Exploring the DOL Fiduciary Rule & Its Effect on Providers of Investment Advice,” Annual Ulmer Financial Services & Securities Litigation Client CLE Seminar (November 2016)
- “Wellness Programs, HIPAA, and the EEOC: What To Do With All The Regulation,” Ohio Chamber of Commerce CLE Seminar (October 2016)
- “ACA Reporting – Struggles, Lessons Learned, and Emerging Trends,” Seminar and Panel Discussion (June 2016)
- “What’s Up With Compliance?,” Health Action Council Webinar (February 2016)
- “Current Impact of the Affordable Care Act,” Tax Club of Cleveland (September 2015)
- “The Department of Labor as an Investment Management Regulator and Current Areas of Focus During Examinations,” Co-Presenter, Chicago Compliance Group (September 2014)
- “Employers' Obligations Under the Affordable Care Act,” Ohio State Bar Association Webinar (July 2014)
- “Affordable Care Act (Obama Care),” 50th Annual Midwest Labor and Employment Law Seminar (October 2013)
- “Affordable Care Act Technical Updates,” SS&G Webinar (September 2013)
- “Employee Benefit Issues & M&A,” ACI's 2nd National Advanced Compliance and Benchmarking Forum

(May 2013)

- “Patient Prosecution and Affordable Care Act of 2010: Implications for 2013 and Beyond Require Planning and Preparation Now,” Employment Law Update Seminar (May 2013)
- “Putting Health Reform into Action: Next Steps for Employers,” SS&G Health Care Reform Update (January 2013)
- “The New Retirement Plan Fee Disclosure Rules: What's Next for Plan Sponsors?” The Cleveland Chapter of WEB (September 2012)
- “The Mandate Decision & You,” Britton Gallagher Benefits (July 2012)
- “Health Benefit Considerations for Labor and Employment Lawyers,” 48th Annual Midwest Labor and Employment Law Seminar (October 2011)
- “Tax Issues in Settlement and Separation Agreements,” 47th Annual Midwest Labor and Employment Law Seminar (October 2010)
- “Contingent Workers and Employee Benefits - Should We Worry?,” American Conference Institute (May 2010)
- “Employment Contracts: Drafting Critical Provisions, Including Executive Compensation, Noncompete and Proprietary Information Provisions,” 45th Annual Midwest Labor and Employment Law Seminar (October 2008)
- “409A,” Accountant’s Training Session (November 2006)
- “Benefits Issues,” Rockwell Automation (August 2006)
- “COBRA Notice Issues,” Ulmer & Berne Employment & Labor Law Seminar (May 2006)
- “ERISA Considerations for Financial Service Providers,” Hot Topics: Financial Services Update 2006 (May 2006)
- “Employee Benefits and ERISA and Retirement Plan Administration: EGTRR Benefit Changes - Part I,” Cleveland Tax Institute, Cleveland Bar Association (October 2001)
- “ASPPA Benefits Council of Cleveland,” presentation with IRS Specialists from Chicago regarding Employee Plans Compliance Resolution System (June 2001)
- “Understanding HIPAA as It Applies to Health Care Provider’s Use of Health Information,” Aultman Health System Medical Staff (September 2000)
- “Legal Considerations in Maintaining the Privacy of Medical Records,” The Benefits Forum, Manufacturers Alliance (June 2000)
- “Employee Benefits Considerations in Mergers and Acquisitions,” Cleveland Tax Institute, Cleveland Bar Association (November 1999)
- “Administering Employee Benefits to Ensure Compliance With a Litany of Complex and Conflicting Federal Laws,” Personnel Law Update 1998, Council on Education and Management (June 1998)
- “Cutting Edge Issues in Employee Benefits,” Cleveland Tax Institute, Cleveland Bar Association (October 1997)

ERISA Litigation

- “Journey to the World of ERISA - What’s New?,” Ulmer Webinar (February 2020)

- "ERISA Litigation Update," 46th Annual Midwest Labor and Employment Law Seminar (October 2009)
- "Winning ERISA Litigation," PriceWaterhouseCoopers General Counsel Forum (August 2008)
- "ERISA Update for Financial Services Providers," Hot Topics: Financial Services Update 2007 (November 2007)
- "What's New in Employee Benefits," Midwest Labor & Employment Law Seminar, Ohio State Bar Association Labor and Employment Law Section (October 2003)
- "Employee Benefits "Promises to Keep," Midwest Labor & Employment Law Seminar, Ohio State Bar Association Labor and Employment Law Section (November 2002)
- "Benefits Issues in Downsizing the Executive," Midwest Labor & Employment Law Seminar, Ohio State Bar Association Labor and Employment Law Section (October 2001)
- "Preemption Under ERISA," Midwest Labor & Employment Law Conference, Ohio State Bar Association Labor and Employment Law Section (October 1999)
- "ERISA Developments Affecting the Employment Relationship," Midwest Labor & Employment Law Conference, Ohio State Bar Association Labor and Employment Law Section (October 1997)

Executive Compensation

- "Navigating Executive Compensation," EPC Cleveland's Annual Joint Luncheon with Tax Club (May 2025)
- "What's New with Deferred Compensation," Cohen & Company Continuing Education Program (July 2015)

Individual Retirement Accounts

- "Journey to the World of ERISA - What's New?," Ulmer Webinar (February 2020)
- "ERISA Litigation Update," 46th Annual Midwest Labor and Employment Law Seminar (October 2009)
- "Winning ERISA Litigation," PriceWaterhouseCoopers General Counsel Forum (August 2008)
- "ERISA Update for Financial Services Providers," Hot Topics: Financial Services Update 2007 (November 2007)
- "What's New in Employee Benefits," Midwest Labor & Employment Law Seminar, Ohio State Bar Association Labor and Employment Law Section (October 2003)
- "Employee Benefits "Promises to Keep," Midwest Labor & Employment Law Seminar, Ohio State Bar Association Labor and Employment Law Section (November 2002)
- "Benefits Issues in Downsizing the Executive," Midwest Labor & Employment Law Seminar, Ohio State Bar Association Labor and Employment Law Section (October 2001)
- "Preemption Under ERISA," Midwest Labor & Employment Law Conference, Ohio State Bar Association Labor and Employment Law Section (October 1999)
- "ERISA Developments Affecting the Employment Relationship," Midwest Labor & Employment Law Conference, Ohio State Bar Association Labor and Employment Law

Section (October 1997)

General

- "Strategies for Inclusivity in an Uncertain Future," Co-Presenter, The Law & Leadership Institute's Creating Equitable & Inclusive Workplaces in the Current Legal Landscape (February 2025)
- "Leading Through the Hurricane," Cleveland Metropolitan Bar Association's Leadership Academy (January 2023)
- "Perspectives from Local Female Rainmakers and Leaders," Panelist, Ladder Down Cleveland (August 2019)
- "Planning in the Digital Age," Ulmer Tax Seminar Series II (August 2018)
- "How I Learned to Stop Worrying and Love the Fiduciary Rule. An Advisor's Primer to making a Living Under the New Regime," NAIFA Cleveland Monthly Series (May 2017)
- "Women as Visionary Leaders," Panelist, 3rd Annual Women's Law & Leadership Conference (October 2014)

News & Media

June 4, 2026

UB Greensfelder Earns Top Rankings in Chambers USA 2026 Edition

March 27, 2026

Patricia A. Shlonsky Re-appointed President of Cuyahoga County Public Library Board of Trustees

October 27, 2025

UBG's Patricia Shlonsky Honored with Ohio State Bar Foundation's Ramey Award for Distinguished Community Service

August 21, 2025

UB Greensfelder Attorneys Recognized in The Best Lawyers in America® 2026 List

June 5, 2025

UB Greensfelder Expands Chambers USA Rankings with 13 Practices and 24 Attorneys Recognized in the 2025 Edition

December 17, 2024

Ohio Super Lawyers Recognizes 57 UB Greensfelder Attorneys in 2025

August 15, 2024

UB Greensfelder Attorneys Recognized in The Best Lawyers in America® 2025 List

August 7, 2024

Patricia A. Shlonsky Joins Planned Parenthood of Greater Ohio Board of Directors

June 6, 2024

Nine UB Greensfelder Practices and 22 Attorneys Recognized by Chambers USA 2024

February 26, 2024

Crain's Cleveland Business Recognizes Three UB Greensfelder Attorneys Among 2024 Notable Women in Law

Crain's Cleveland

December 29, 2023

Ohio Super Lawyers Recognizes 50 Ulmer Attorneys in 2024 Lists

August 17, 2023

Ulmer Attorneys Recognized in The Best Lawyers in America® 2024 Report

June 7, 2023

Chambers USA 2023 Report Gives Ulmer Top Marks

April 13, 2023

ORT Ohio Honors Ulmer Partner Patricia A. Shlonsky with 2023 Jurisprudence Award

January 6, 2023

Ohio Super Lawyers Recognizes 69 Ulmer Attorneys in 2023 Lists

August 23, 2022

Ulmer Partner Patricia A. Shlonsky Appointed to Board of Directors of Bellefaire Jewish Children's Bureau

August 18, 2022

Ulmer Attorneys Recognized in The Best Lawyers in America® 2023 Report

June 2, 2022

Ulmer Earns Top Marks in Chambers USA 2022 Report

May 10, 2022

OSBA Honors Ulmer Partner Patricia A. Shlonsky With Nettie Cronise Lutes Award

January 4, 2022

Ohio Super Lawyers Recognizes Ulmer Attorneys in 2022 Lists

October 18, 2021

Cleveland Jewish News Names Ulmer Partner Patricia A. Shlonsky to 2021 List of "18 Difference Makers"

May 20, 2021

Ulmer & Berne Honored in Chambers USA 2021 Edition

In the News

- *Cleveland Jewish News*, "[Progress continues for women in the legal profession](#)" (January 28, 2026)
- *Cleveland Jewish News*, "[Women leaders bring fresh perspectives to law firms](#)" (February 5, 2025)
- *Cleveland Jewish News*, "[Local Lawyers, Super Attorneys Patricia Shlonsky | UB Greensfelder](#)" (January 31, 2025)

- *Cleveland Jewish News*, "Shlonsky, Szmagala to receive ORT Jurisprudence Awards"
(June 20, 2023)