

CHARLES J. YOVINO

Global HR GRC

Charlie Yovino is the founder and CEO of Global HR GRC, and he consults, trains, writes and speaks on HR governance, risk management, and compliance (GRC). He also provides expert witness support on select cases. His most recent book is [Undivided Loyalty: Retirement Plan Governance and How to Reduce and Manage Fiduciary Risk](#). Prior to creating Global HR GRC, Charlie led the Atlanta Global HR Services (GHRG) practice and was a national resource for HR and benefit plan GRC, focusing on financial management, risk management and controls, transaction effectiveness, and HR operational excellence.

Included among the variety of special projects on which Charlie consulted, are:

- Design and administrative considerations for all types of qualified and nonqualified retirement plans, including preparation of administrative manuals and quality controls
- Compliance, controls, risk management and governance reviews covering all plan and benefit types (including qualified retirement plans, nonqualified plans, COBRA, HIPAA, ACA, cafeteria plans, and others), which in the aggregate benefit approximately 3 million participants
- Developing strategy and implementation roadmap for global HR compliance organization
- Evaluate global benefit plan governance, compliance and risk management and propose strategy to improve GRC
- Training of plan committee members and employee benefits and internal audit personnel
- Work-flow and staffing studies of employee benefits departments
- Plan spin-offs, mergers and terminations
- Due diligence reviews and golden parachute calculations
- Total benefit program design and implementation following corporate spin-offs
- Implementing benefits-based tax strategies, such as 404(k) dividend deductions
- Project management of complex benefit program implementations, including open enrollment, benefit outsourcing, vendor transitions, and global GRC reviews involving 7-32 countries
- Benefit plan vendor searches and reviews

Charlie frequently trains, speaks and writes on HR issues. The following is a sampling of his work:

Governance

- Author of [Undivided Loyalty: Retirement Plan Governance and How to Reduce and Manage Fiduciary Risk](#) (2018).
- Presenter before The Governance Center at The Conference Board's Global Benefits and Compensation Roundtable on "Global De-Risking of DB Plans" (July 2014), and served as an advisor for the organizing committee on presentations
- Authored "All together now: An effective approach to global HR and benefit plan governance," [HR Innovations](#) (April 2015)
- "Improve and streamline global performance: The power of governance risk and compliance to corral chaos," [HR Innovations](#) (Winter 2014)
- Presented at the NCPERS Public Safety Employees Pension & Benefits Conference in 2008 on "*Pitfalls and Practicalities of Pension Plan Governance*"
- Co-presented a Webinar in 2008 sponsored PwC and the National Association of State Retirement Administrators (NASRA) on "*Public Pension Plan Governance*"
- Co-authored a Whitepaper for PwC on *Plan Governance* (republished in [HR Innovations](#), [CFO Direct](#) and [Financial Executives International](#))

Risk Management and Controls

- Faculty member at the Practising Law Institute's "Pension Plan Investments 2018: Current Perspectives (New York City, May 15, 2018), where he co-presented on *Outsourcing Fiduciary Risk*. He also authored a chapter for the companion book on *Retirement Plan Governance and How to Reduce and Manage Fiduciary Risk*.
- Served as a subject matter specialist on the re-write of [Internal Control – Integrated Framework](#) prepared by the Committee of Sponsoring Organizations of the Treadway Commission (COSO) (released May 2013)
- Speaker at Institute of Internal Audit (IIA) Atlanta, Boston, Las Vegas and San Jose local chapters on "Internal Audit of HR"
- Speaker at the 2010 Profit Sharing/401(k) Council of America National Conference on "*Risk Intelligent 401(k) Management*"
- Extensively quoted in [Bloomberg BNA's Human Resources Report](#) (as part of a *Workforce Strategies* white paper on managing benefit plan risks)

Compliance

- Chaired a webinar for the National Association of College and University Business Officers (NACUBO) on "*New Compliance and Audit Requirements for Section 403(b) Plans*" (2009)
- Panellist at University of Georgia's School of Law Working in the Public Interest Conference on *Issues Post-Obergefell v. Hodges* (February 2016)
- Co-presenter at webinar, "*Affordable Care Act (ACA) Employer Reporting with PwC and Workday*" (Oct. 2015)
- Contributing editor for the Thompson Publishing Group's book, [HR and Benefits Guide to Mergers & Acquisitions](#)
- Other articles published in sources such as: [The Monthly Digest of Tax Articles](#), [The Journal of Compensation and Benefits](#), [The Journal of Taxation of Exempt Organizations](#), [Contingencies](#), [The National Psychologist](#) and [SHRM On-Line](#). He is often quoted in the benefits press including: [The Wall Street Journal](#), [Business Insurance](#), and [Human Resource Executive Online](#)

Prior to joining PwC, Charlie was a tax/ERISA associate with a Washington, DC law firm, and served as a Senior Reviewer in the Employee Plans Technical and Actuarial Division in the National Office of the IRS.

Charlie received his B.A. (cum laude) in history (with honors) from Hofstra University, a J.D. from American University, and a Masters of Law in Taxation from Georgetown University Law Center.