

## EDWARD R. RATAJ, CCP, CECP, ACCP, MCCP



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Managing Director, Compensation Consulting

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Mr. Rataj is the Managing Director, Compensation Consulting of CBIZ Talent and Compensation Solutions. He joined CBIZ in 2003 to oversee CBIZ's Compensation Consulting Division. His career in compensation consulting began in 1995. Since then, he has amassed extensive experience in the area of compensation, focusing on designing innovative executive, broad-based and sales compensation programs. His core business is consulting with corporate clients across various industries in the area of compensation. In addition to his core corporate work, Mr. Rataj serves as an expert witness in the area of reasonable compensation.

### Expertise

- Litigation Support
- Reasonable Compensation Opinions
- Executive Compensation
- Closely held businesses
- Incentive Programs
- Sales Compensation
- Market-Based and Job Evaluation-Based Compensation Systems

### Experience

- Qualified as an expert witness in compensation-related matters including reasonable compensation, intermediate sanctions, rebuttable presumption, competitive market value and Defense Contract Audit Agency (DCAA) allowable compensation.
- Testified in the area of reasonable compensation.
- Managed the development and implementation of multiple compensation programs for clients, including broad-based systems, annual incentive and equity plans, executive compensation packages and sales compensation programs.
- Created consolidating compensation plans for organizations completing mergers and acquisitions.
- Previously worked for leading human resources consulting firms, including Mellon (formerly Buck Consultants) and William M. Mercer.





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## Representative Engagements

- Assessed and testified regarding the reasonable compensation level for a nationally recognized law firm partner as part of a family law matter.
- Conducted a compensation study to determine reasonable compensation over a 19-year period for the owner/executive of a real estate development firm that was under investigation by the Internal Revenue Service
- Performed compensation analyses to compare the compensation package provided to the Chief Executive Officer of a billion-dollar trust fund to reasonable compensation levels
- Evaluated 12 years of compensation paid to the deceased owner/executive of a commercial printing company as a key element of an estate dispute
- Formed a reasonable compensation opinion for two executives of a large pipe supplier and assessed an IRS opinion and methodology regarding the appropriateness of dividends and compensation provided to the executives
- Assessed reasonable compensation for two executives of a family-owned healthcare supply company following a change in control
- Assisted in avoiding litigation and negotiating compensation for services provided as liquidating trustee of a company holding a patent which the client was directly responsible for selling at a significant return on investment for the other partners

## Background

### *Education and Academic*

- B.S. – Finance, Miami University (Ohio), 1995
- Guest Lecturer for Washington University Master’s level course (2010-2015). Lecture topics included Reasonable Compensation in Closely Held Businesses and Sales Incentive Plan Design.

### *Professional Licenses and Memberships*

- Advanced Certified Compensation Professional (ACCP)
- Certified Compensation Professional (CCP)
- Certified Executive Compensation Professional (CECP)
- Master Certified Compensation Professional (MCCP)
- WorldatWork
- Society of Certified Professionals (WorldAtWork)
- Former President of Compensation and Benefits Network of Greater St. Louis (CBN)

## Publications

- Currently finalizing a book titled Reasonable Compensation, A Specialist’s Approach - Co-Authored by Priya Kapila.
- Reasonable Compensation originally published in the November 2016 issue of Thomson Reuters Checkpoint’s Practical Tax Strategies.
- Reasonable Compensation – Elements of Compensation originally published in the December 2016 issue of Thomson Reuters Checkpoint’s Practical Tax Strategies.





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- Reasonable Compensation – Market Analysis Considerations originally published in the January 2017 issue of Thomson Reuters Checkpoint’s Practical Tax Strategies.
- Reasonable Compensation – Market Competitive Compensation Data originally published in the February 2017 issue of Thomson Reuters Checkpoint’s Practical Tax Strategies.
- Reasonable Compensation – Fundamental Compensation Related Statistics originally published in the March 2017 issue of Thomson Reuters Checkpoint’s Practical Tax Strategies.
- Reasonable Compensation – Standard Methodology originally published in the April 2017 issue of Thomson Reuters Checkpoint’s Practical Tax Strategies.

### Presentations

- “Creating and Using a Salary Increase Matrix” – Presented approximately 30 times both in-person and via webinar.
- “Creative Compensation Strategies” – Moderator, The Entrepreneurship Institute
- “Nonprofit Guide to Navigating Intermediate Sanctions” – Presented approximately 20 times both in-person and via webinar. CPE Credit Eligible.
- “Sales Compensation Plan Design” – Presented approximately 10 times both in-person and via webinar.
- “Trends in Compensation and Best Practices in the Current Economy” – Presented approximately 40 times both in-person and via webinar
- “Strategies for Fair Employee Selection and Compensation” – Lorman Education Services – April 2, 2007.
- “Compensation Strategies” - Minnesota Society for Human Resource Management (SHRM) conference - December 12, 2006. Also delivered to the Women’s Professional Organization on May 10, 2007.
- “Incentive Pay Plan Blunders That Can Cost You a Fortune” – B21 Publishing via webinar – February 6, 2008 and August 6, 2008 (co-presented with Kevin Nussbaum).
- “Government Contractor Compensation Issues and Audits” – Association of Government Accountants - San Diego – April 10, 2007 and December 10, 2008.
- “Sales Compensation Tips: Retaining and Motivating a High-Performance Sales Force” – BizSummits via Webinar – approximately May 19, 2009.
- “Paid Time-Off Banks: Can They Save You Time, Money, and Headaches?” – B21 Publishing via Webinar, September 23, 2009 (co-presented with Kevin Nussbaum).
- “Guide to Fair Pay Compliance & Best Practices” – Webinar, December 15, 2009 (co-presented with Priya Kapila).
- “How Top CFOs Set Pay Ranges the Right Way” - B21 Publishing via webinar - October 31, 2007. Also delivered under different titles on June 3, 2008 and January 12, 2010.
- “Show Me the Money! The Exploration, Examination and Dissection of Reasonable Compensation” – BVR/Morningstar 3rd Annual Summit on Business Valuation in Divorce – September 14, 2010, CPE/CLE Credit Eligible.
- “Incentive-Based Compensation” – Podcast interview [www.forconstructionpros.com](http://www.forconstructionpros.com) on October 23, 2010.





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- “Municipal Pay - Best Practices in Pay Equity in Minnesota” – Minnesota SHRM 2013 State Conference – October 14, 2013
- “Top Ten Trends and Best Practices in College and University Talent Management” – Webinar, Part One: December 5, 2013, Part Two: February 6, 2014 (co-presented with Jan Asnicar)
- “Reasonable Compensation in Closely-Held Companies” – Vistage CEO Group – February 19, 2014
- “The \$199,000 Threshold-Executive Compensation in NY Tax Exempt Organizations: Nonprofit Guide to Navigating Intermediate Sanctions & Executive Order 38” – FMA Conference – May 8, 2014
- “Reasonable Compensation in Closely- Held Companies”- FMA Conference- May 2014
- “Trends in Compensation and Best Practices in the Current Economy”- NHRA Luncheon- October 23, 2014
- “Overcoming Top Compensation Issues in Law Firms- ALA Conference; Las Vegas, NV- November 4, 2014
- “Executive Compensation in the Not-For-Profit World”- Jewish Federations of North America- 2014
- “Top Human Resources Issues in Community Pharmacies”- University of Findlay College of Pharmacy- 2014
- “Best Practices in Compensation and Succession Planning for the Construction Industry”- CBIZ MHM Construction Webinar- Co-Presenter: Karen Fenaroli- May 18, 2015
- “FLSA and Minimum Wage Changes”- ZMS CFO Roundtable- St. Louis Art Museum- October 2015
- “The New Fair Labor Standards Act Regulations: Optimizing Implementation Costs to Fit Your Culture” Co-Presenter: Jeff Wilcox- August 26, 2016





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### Media Quotes

Mr. Rataj has been quoted as an expert in the area of compensation in the following articles:

Miller, Stephen. "IBM Adopts End-of-Year 401(k) Matching Payment." *HRMagazine* 1 Feb. 2013

Mueller, Angela. "Monsanto Paychecks Grow." *St. Louis Business Journal*, 3 Aug. 2012.

Nicholas, George. "How to Reward Top Performers." *Chief Executive* . December 1, 2011.

"How to Find Out if You're Underpaid." Yahoo! HotJobs. August 17, 2010.

LaCapra, Lauren Tara. "Wall Street Whispers: Goldman's Rep (and Hank Paulson's)." *The Street*. July 30, 2010.

LaCapra, Lauren Tara. "Wall Street Pay Q&A." *The Street*. May 26, 2010.

Sheryl Nance-Nash. "Executive Compensation: Reforms are Slowly Gaining". AOL Daily Finance. February 26, 2010.

Nicklaus, David. "Pay Czar is Missing Mark." *St. Louis Post-Dispatch*. October 27, 2009.

Stringfellow, Jamie. "A Raise During These Economic Times? Maybe it's not so crazy." *Association News*. October 2009.

Todorova, Aleksandra. "How to get Promoted in a Recession." *SmartMoney.com*. August 25, 2009.

Prior, Anna. "Employers Cut Back on Aid to Laid-Off Workers." *The Wall Street Journal*. August 9, 2009.

