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R&ITS Offerings, Expertise Attract Business of Major Global Law Firm

BOK Financial - Posted by Corporate Communications on Sep 29, 2005 - Viewed 5 times.

A combination of teamwork, a commitment to service and expertise serving large professional corporations has helped BOK Financial's Retirement & Institutional Trust Services Department (R&ITS) win the retirement plan business of one of the world's largest law firms.

R&ITS was recently hired as trustee, custodian and recordkeeper for the 401(k) plan of the combined law firm of DLA Piper Rudnick Gray Cary US LLP, which is headquartered in Baltimore.

The firm is considered the world's second largest according to revenue and third largest based on the number of attorneys, which includes more than 1,000 lawyers on both sides of the Atlantic.



A cross-departmental team of employees joined together to help attract business from one of the world's largest law firms.

The firm recently merged and consolidated their retirement plans and 401(k) providers, which together have total assets of more than \$500 million. BOKF's primary competitors for the attractive portfolio were Fidelity and T. Rowe Price.

The successful effort resulted from collaboration among employees from around the bank, including various areas of R&ITS.

[JoAnn Schaub](#), [Diane Jenkins](#) and [Jeff Sanders](#) led the effort for R&ITS. Others from around the bank were also instrumental in winning the business, including employees in Trust Operations, Information Services, Trust Legal and BOSCO, as well as executive management.

The primary team responsible for servicing the account includes [Ben Reynolds](#), [Steve McCarthy](#), [Julie Dean](#), [Charles Harris](#) and [Jeff Sanders](#).

"This example of initiative, teamwork and consistency demonstrates how we can compete effectively against financial service providers of any size in the country," said Executive Vice President [Jim Holloman](#), who oversees the Trust Division.

The bank now serves as trustee on retirement plans of two of the 10 largest law firms in the world, as well as several other large national law firms headquartered in Los Angeles, Chicago, Kansas City, Milwaukee and Dallas.



BANK OF OKLAHOMA
RETIREMENT AND INSTITUTIONAL TRUST SERVICES

R&ITS now oversees almost 600 institutional 401(k) plans, pension plans

and institutional trust accounts for clients that range from small businesses to large publicly traded companies. Several of the accounts have more than \$100 million in assets and thousands of plan participants.

BOKF's group is also one of the largest regional providers of institutional trust services providing institutional money management and custody services to foundations, endowments and other entities.

Overall, R&ITS clients represent more than \$12.8 billion in trust assets. BOKF is responsible for direct management of more than \$2.2 billion of that total.

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