



Lois Wagman Colbert

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Services

Employee Benefits; Executive Compensation; Retirement Income Plans; RIFS & Severance Plans; Business Transactions; Fiduciary Counseling; Tax; Emerging Companies

Industries

Retail & Consumer Goods; Automotive; Consumer Goods; Home Furnishing; Technology, Electronic Equipment & Software; Banking & Credit Unions

Lois Colbert engages in a comprehensive employee benefits practice with concentration in the areas of deferred compensation (including 409A compliance), retirement plan qualification (including drafting and obtaining Internal Revenue Service determination letters on tax-qualified status), equity compensation, fiduciary responsibility, prohibited transactions (including obtaining Department of Labor exemptions) and negotiation of employee benefit aspects of business transactions.

Ms. Colbert is a frequent speaker on various employee benefits and equity compensation topics. She has been an author or editor for each annual supplement to "Employee Benefits Law" from 2001 to 2010. Prior to joining the firm, she was associated with a law firm in Washington D.C., where she also concentrated in the area of employee benefits.

Ms. Colbert was listed as a North Carolina "Super Lawyer" in the area of Employee Benefits/ERISA Law in 2006, 2011, 2014, 2015, 2016 and 2017 by *Super Lawyers* magazine and in 2012, 2013 and 2017, she was named a North Carolina "Top 50 Women Super Lawyer" by *Super Lawyers* magazine. Ms. Colbert was recognized in *The Best Lawyers in America*® for Employee Benefits (ERISA) Law in 2018 and the five years immediately preceding. She was also named a 2014 "Charlotte Lawyer of the Year" in the area of Employee Benefits (ERISA) Law by *The Best Lawyers in America*®. Ms. Colbert was named one of "Charlotte's 50 Influential Women" in 2012 by *The Mecklenberg Times*. She was the recipient of *Business Leader* magazine's "2008 Movers & Shakers" award. Ms. Colbert was also recognized by the American Lung Association of North Carolina as its 2002-03 "Volunteer of the Year."

Experience Highlights

Sale of business for supplier of custom machine parts

Represented a long-established supplier of seals, O-rings and other custom machine parts in connection with the sale of its business to a UK-based public company.

Representation of a leading source of commercial information

Comprehensive benefits and compensation representation to one of the world's leading sources of commercial information and insight on businesses. Recently assisted with a comprehensive set of revisions to its equity long-term incentive plan, the related award agreements, agreements and arrangements related to change-in-control, and related disclosures.

Bolt-On Acquisition of Medical Device Manufacturer

Represented French private equity fund sponsor and its portfolio company, a Franco-American manufacturer of surgical devices, in the leveraged acquisition of 95 percent of an Alabama-based contract manufacturer of medical devices.

Merger of office supply companies

Addressed the employee benefit aspects of the merger of two office supply companies, a transformational event in the office supply business. Since the merger was completed, we have been assisting in transitioning all legacy employees to the employee benefit system, consolidating the employee benefit plans, including various frozen pension and frozen retiree medical

plans, and handling all other aspects of the post-merger employee benefits transition. Otherwise provide comprehensive benefits and compensation representation.

*Experience gained by attorney prior to joining Kilpatrick Townsend

Publications, Articles and Speaking Engagements

Targeted IRS Examinations of Section 409A Compliance
BNA Tax and Accounting Center, July 11, 2014

Reimbursement Arrangements
Section 409A Handbook, December 01, 2010

Employee Benefits Law
Employee Benefits Law, Third Edition, January 01, 2010

Key ERISA Concepts
North Carolina General Practice Deskbook 2nd Ed., January 01, 1998

New Guidance on Health Plan Laws
North Carolina Lawyers Weekly, September 01, 1996

Professional & Community Activities

American Bar Association, Tax Section

American Bar Association, Labor and Employment Law Section, Former Senior Editor of Employee Benefits Law, Member of Employee Benefits Committee

American Lung Association of the Atlantic Coast, Former Board Member

National Association of Stock Plan Professionals (NASPP), Member

ASPPA Benefits Council of the Carolinas, Board Member

NASPP Carolinas Chapter, Former Board Member and Former President

Junior League of Raleigh, Former Treasurer and Former Member

Education

University of Michigan Law School, J.D. (1988)

University of Illinois, B.S., Accountancy (1985)
with high honors

Bar Admissions

North Carolina (1994)