

Lois Wagman Colbert

Partner

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Services

Business Transactions
Emerging Companies
Employee Benefits
Executive Compensation
Fiduciary Counseling
Retirement Plan Design &
Administration
RIFS & Severance Plans
Securities
Tax

Industries

Automotive
Consumer Goods
Home Furnishings
Retail & Consumer Goods

Lois Colbert is the leader of the Employee Benefits Practice Group of Kilpatrick Townsend. She 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



and 2011, and again in 2019 and the five years immediately preceding, 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 2019 and the six 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

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.

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.

Education

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

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

Admissions

North Carolina (1994)

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

Insights

[In The News](#)

Kilpatrick Townsend Counsels Liberty Bancorp, Inc. in Merger Agreement
April 11, 2019

[News Releases](#)

Kilpatrick Townsend Attorneys Named 2019 North Carolina Super Lawyers
January 28, 2019

[In The News](#)

Record-Breaking Recognition for Kilpatrick Townsend in The Best Lawyers in America® 2019
August 20, 2018

[News Releases](#)

Deal Announcement: WSFS Financial Corporation Announces Combination with Beneficial Bancorp, Inc.
August 8, 2018

[Publications](#)

Guest Column: Tax Cuts and Jobs Act Makes Changes to Executive Compensation
March 1, 2018

[News Releases](#)

Kilpatrick Townsend Attorneys Named 2018 North Carolina Super Lawyers
February 6, 2018

[Alerts](#)

2018 Benefit Limits
October 19, 2017

[News Releases](#)

Record-Breaking Recognition for Kilpatrick Townsend in The Best Lawyers in America® 2018
August 15, 2017



[News Releases](#)

Kilpatrick Townsend Attorneys Named 2017 North Carolina Super Lawyers

January 30, 2017

[Alerts](#)

IRS Provides Guidance for the Post-Determination Letter Era

October 19, 2016

[News Releases](#)

Kilpatrick Townsend Earns Record-Breaking Recognition in Annual Best Lawyers in America 2017

August 16, 2016

[In The News](#)

Kilpatrick Townsend's Media Report February 4-11, 2016

February 12, 2016

[Events](#)

Retail & Consumer Goods Webinar: Top 10 Section 409A Mistakes in Employment and Separation Agreements

February 9, 2016

[News Releases](#)

Kilpatrick Townsend Attorneys Named 2016 North Carolina Super Lawyers

January 15, 2016

[Alerts](#)

2016 Benefit Limits

January 4, 2016

[In The News](#)

Kilpatrick Townsend's Media Report October 2-8, 2015

October 9, 2015

[News Releases](#)

Kilpatrick Townsend Earns Record-Breaking Recognition in Annual Best Lawyers in America 2016

August 19, 2015



[Alerts](#)

Obergefell Simplifies Benefit Plan Administration

July 1, 2015

[Alerts](#)

Impact of Updated Fiduciary Investment Advice Definition on Large Plans

May 5, 2015

[In The News](#)

Kilpatrick Townsend's Media Report April 23-30, 2015

May 1, 2015

[News Releases](#)

Kilpatrick Townsend Attorneys Named 2015 North Carolina Super Lawyers

January 28, 2015

[Alerts](#)

2015 Benefit Limits

January 6, 2015