

Lois Wagman Colbert

Partner

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Services

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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.

Lois is the co-author of the chapter on "Reimbursement Arrangements" in the first, second and third (most recent) editions of the BNA publication "Section 409A Handbook". She is a frequent speaker on various employee benefits and equity compensation topics. Lois 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.

Lois was listed as a North Carolina "Super Lawyer" in the area of Employee Benefits/ERISA Law in 2006 and again in 2023 and the 12 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. She was



recognized in *The Best Lawyers in America*® for Employee Benefits (ERISA) Law in 2023 and the ten 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*®. In 2021 and 2022, Lois was named to *Business North Carolina's* "Power List". She 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. She 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. (1985) Accountancy, *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

[News Releases](#)

135 Kilpatrick Townsend Attorneys Recognized in 2022 Super Lawyers
December 15, 2022

[Publication](#)

DOL Proposes Self-Correcting of Delinquent 401(k) Contributions
November 29, 2022

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Kilpatrick Townsend Earns Top Recognitions in 2023 Edition of The Best Lawyers in America®
August 18, 2022

[Publication](#)

Steve Berlin and Lois Colbert Recognized on Business North Carolinas Power List 2022
August 15, 2022

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Steve Berlin and Lois Colbert Recognized on Business North Carolina's Power List 2021
November 22, 2021