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Services

Corporate, Employee Benefits & Executive Compensation,

Debra is Burr & Forman's ERISA veteran. Her expertise derives from assisting clients with the tax and fiduciary aspects of employee benefits for over 30 years.

Debra has extensive experience with benefit programs, including retirement, health & welfare, and executive compensation:

Retirement — qualified plans (profit sharing, money purchase, pension (traditional and cash balance), and 401(k) plans); 403(b) plans; governmental entity 457 plans; and ESOPs.

Health & Welfare — COBRA, HIPAA and Affordable Care Act compliance for health plans; fringe benefits; life and disability benefits; voluntary benefits.

Executive Compensation — non-qualified plans; tax-exempt entity 457 plans; incentive and separation pay; and 409A compliance.

Her expertise includes drafting plan documents (including plan, summary plan description, summary of material modifications, amendments) and related instruments (including resolutions, policies, procedures, forms and notices); providing advice on issues involving plan design and administration, fiduciary duties and tax compliance; QDROs; and preparing administrative filings with and representing plan sponsors, fiduciaries and plans before the Internal Revenue Service, Department of Labor, and Pension Benefit Guaranty Corporation.

Publications

- Burr Alert: Deferred Compensation and the New Tax Act
- Voluntary Benefits: Time for an ERISA Checkup
- *Birmingham Medical News*: New Fiduciary Rule for Retirement Plans
- *Birmingham Medical News*: Same-Sex Marriage Issues for Employers

- *Birmingham Medical News: So, Are You REALLY Compliant With HIPAA?*

Education

L.L.M. in Taxation, University of Alabama School of Law, (1990)

J.D, University of Alabama School of Law, (1982)

B.A., University of Alabama, (1979)

Licensed In

Alabama

Professional Associations

Alabama State Bar

American Bar Association, Labor & Employment Section Member, Employee Benefits Subcommittee

Birmingham Bar Association

Gulf Coast TE/GE Council

Alabama Profit Sharing/401(k) Council

Southeast Benefits Education in Neptune (SBEN) (formerly the Southern Employee Benefits Conference (SEBC), President 2013-2014

Community Involvement

Patron, Alys Stephens Center for the Performing ARts

Member, Vulcan Park Foundation

Member, Alabama Trust for Historic Preservation

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