

Meredith Gage

Senior Associate

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Employers and service providers call on Meredith for her multidisciplinary approach to handling complex employee benefits and executive compensation matters. She assists clients with the development and continuing compliance of qualified, nonqualified, and health and welfare plans, and advises on a variety of employee benefits matters as a result of fund offerings and M&A activity.

Meredith Gage is a senior associate in the Employee Benefits & Executive Compensation Group. She focuses her practice on the design, implementation, and ongoing compliance of benefit plans, including pension, 401(k), 403(b), 457, ESOP, top hat, severance, and health and welfare plans. She advises employers and benefit plan service providers on the complex legal and fiduciary issues arising under ERISA, the Internal Revenue Code, the Affordable Care Act, the CARES Act, and other state and federal laws pertaining to benefit plans and programs. Meredith represents clients before the IRS and Department of Labor and has obtained favorable results in audits, voluntary correction applications, and other regulatory matters.

In addition, Meredith counsels clients on the benefits and executive compensation issues arising in mergers, acquisitions, and other business reorganizations, including due diligence and post-closing benefit structuring. She also advises on plan asset and prohibited transaction issues arising under Title I of ERISA in private fund offerings.

She is recognized by *The Best Lawyers in America*® as “One to Watch” in Employee Benefits (ERISA) Law.

Representative Experience

- Assisting public, private, governmental, and nonprofit employers in the design and ongoing compliance of qualified and nonqualified deferred compensation plans as well as health and welfare plans.
- Counseling plan fiduciary committees on their fiduciary compliance responsibilities and the handling of benefit claims.
- Representing employers on voluntary correction of errors involving qualified retirement plans, including errors relating to tax qualification and ERISA fiduciary requirements.
- Advising on Code Section 409A compliance for deferred compensation arrangements and executive agreements.
- Representing employers and private equity buyers on benefit plan liabilities and integration in the context of M&A.
- Advising on ERISA plan asset and prohibited transaction issues for investment managers, hedge funds, and private equity funds in connection with fund offerings.

Publications & Presentations

Publications

- “The (Poorly Named) ‘Cadillac Tax’ Part Two: IRS Provides Further Guidance in Notice 2015-52,” *The Self-Insurer*, October 2015.

- “The (Poorly Named) ‘Cadillac Tax’ Part Two: IRS Provides Further Guidance in Notice 2015-52,” *ECFC Flex Reporter*, September 2015.
- “Health and Welfare Plan Sponsor Affordable Care Act and 2014 Year End Checklist,” *ECFC Flex Reporter*, December 2014.

Education

- University of Pennsylvania (J.D., 2014)
- University of Pennsylvania (M.B.E., 2014)
- The University of Chicago (A.B., 2011)

Admitted to Practice

- Georgia

Related Services

Employee Benefits & Executive Compensation | Tax