



Erin C. V. Bailey

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Erin Bailey is a self-proclaimed perpetual learner and problem solver. She helps her clients translate and navigate the ever-changing areas of employee benefits law, mergers and acquisitions, and estate planning, synthesizing complicated technical concepts and jargon into real language and manageable action plans.

Her work related to ERISA and employee benefit matters includes advising clients on:

- qualified retirement plan matters,
- deferred compensation arrangements,
- executive compensation plans including compliance with 409A,
- insured health care plans, self-funded health care plans,
- Section 125 plans (cafeteria plans),
- flexible spending accounts (FSAs), and
- health reimbursement arrangements (HRAs).

Erin also advises clients regarding their fiduciary obligations under ERISA as well as COBRA, HIPAA and ACA compliance. In addition, Erin has experience helping clients navigate the voluntary plan error correction programs offered by the Internal Revenue Service and Department of Labor as well as representing clients in plan audits by the Internal Revenue Service or the Department of Labor.

Half of Erin's practice focuses on complex estate planning matters, including the drafting of wills and trusts, estate administration, business succession planning and spearheading family office services.

Having previously worked in-house at a family-owned private equity firm in mergers and acquisitions, Erin has a unique perspective for understanding how companies make decisions and how general counsel offices prefer to work with outside attorneys. In addition, her experience working in a family owned business provided her with invaluable insights into navigating family dynamics in a business setting, knowledge that is useful in both Family Office work and in her complex estate planning practice.

SERVICES

Corporate & Finance

Employment

Fractional General Counsel

Tax

Estate Planning & Wealth Management

Covid-19-Related Issues

EDUCATION

J.D., Emory University School of Law, with honors (2006)

Board Certified Specialist in Estate Planning & Probate Law

Holds Chartered Advisor in Philanthropy designation from The American College of Financial Services

B.A., Cornell University (1996)

Erin is a frequent speaker, presenting to CPAs, CPA firms, financial service professionals and community groups on 401k topics, estate planning, and the Affordable Care Act.

Recent Representative Matters

- When a Third-Party Administrator needed assistance with interfacing with the IRS during an employee benefit plan audit, Erin found an innovative way to decrease the potential IRS fines by over 90%.
- When recently working with a widow who had inherited a significant amount of closely held family business stock from her husband, Erin answered questions which the client had for years that had never been addressed by her previous planners and developed a comprehensive estate plan which worked despite her complex family dynamics and which was optimized the plan for tax purposes.

Outside of the Office

When Erin is not assisting her clients, you can likely find her on an adventure exploring food and wine with her husband, Matt. Together they have discovered pizza parties with a local cheese maker, pop-up dinners with local restaurateurs sitting next to strangers who become friends, potluck dinners at neighborhood houses with live music, breweries who have also mastered the perfect duck sandwich and food trucks which they wish could park in their backyard. At times, Erin is even able to get her two adventurous kids to join in. To work off all her adventures, Erin enjoys walking the family dog, Java, a forever puppy. Erin has lived all over the eastern US, in France and in Australia but is back in North Carolina for good and is excited for her children to grow NC roots (and to get in-state tuition).

Awards



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