

Judy Burdg

Shareholder

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Overview

Judy Burdg is an ERISA attorney whose practice encompasses a broad range of employee benefits matters involving retirement plans, health and welfare plans, and executive compensation. Much of her employee benefits practice is focused on the design, implementation and administration of various forms of retirement and health plans, including 401(k) plans, 403(b) plans, defined benefit plans, collectively-bargained pension plans, employee stock ownership plans (ESOPs), employer-sponsored health plans and wellness programs.

As part of her practice, Judy counsels clients on compliance issues with the Internal Revenue Service and Department of Labor and represents them in agency matters involving plan investigations and audits, governmental reporting, requests for qualified plan determinations, and voluntary correction program submissions. She also advises clients on complex compliance matters related to the implementation of the multi-faceted Affordable Care Act as well as HIPAA, COBRA and USERRA.

A portion of her practice is dedicated to handling employee benefit matters related to corporate mergers and acquisitions.

Judy graduated *cum laude* from the Oklahoma City University School of Law in 2012 and worked in private practice while earning a master of laws degree in taxation from the University of Florida the following year. Her prior career experience includes serving as assistant general counsel with the Protest/Litigation Section of the Oklahoma Tax Commission and as assistant general counsel of a Tulsa-based international consulting and software group of companies.

Judy's achievements have earned her inclusion in *The Best Lawyers in America: Ones to Watch* (employee benefits (ERISA) law).

Admissions

Oklahoma, 2012

Education

LL.M. Taxation, University of Florida, 2013

J.D., *cum laude*, Oklahoma City University, 2012

B.B.A., University of Central Oklahoma, 2008

Professional Organizations and Memberships

Tulsa County Bar Association

Oklahoma Bar Association

SouthWest Benefits Association

Tulsa Employee Benefits Group

Representative Experience

- Assists clients with the design, implementation and administration of tax-qualified retirement plans, nonqualified retirement plans, and health and welfare plans.
- Advises clients regarding health and welfare plans, including COBRA and HIPAA compliance, healthcare reform issues, multiple-employer welfare arrangements, and ERISA compliance issues.
- Prepares and negotiates voluntary correction filings with the IRS under the Employee Plans Compliance Resolution System (EPCRS) for qualified retirement plans.
- Represents clients before the IRS during investigations and in plan determination requests.
- Represents clients before the U.S. Department of Labor during investigations and in correcting plan errors.
- Conducts due diligence on employee benefits issues related to mergers and acquisitions.
- Represented NGL Energy Partners LP (NYSE: NGL), a vertically integrated energy business, in the sale of the remainder of its retail propane business for \$900 million to Toronto, Canada-based Superior Plus Corp. (TSX: SPB).
- Represented Griffin Communications, an Oklahoma City-based media company, in its acquisition of select radio stations from The E.W. Scripps Company (NASDAQ: SSP).
- Represented NGL Energy Partners LP (NYSE: NGL), a vertically integrated energy business, in the sale of a portion of its retail propane business for \$200 million to Dublin, Ireland-based DCC LPG, the leading liquefied petroleum gas sales, marketing and distribution business in Europe.

Honors and Awards

- Selected by peers for inclusion in *The Best Lawyers in America: Ones to Watch* (employee benefits (ERISA) law)
- Named to *Oklahoma Super Lawyers'* list of "Oklahoma Rising Stars," which recognizes the state's up-and-coming attorneys