Chambers
High Net Worth
2020

Leading HNW Professionals worldwide

USA Pennsylvania

How lawyers are ranked

Every year we carry out thousands of in-depth interviews with clients in order to assess the reputations and expertise of business lawyers worldwide. The qualities we look for (and which determine rankings) include technical legal ability, professional conduct, client service, commercial awareness/astuteness, diligence, commitment, and other qualities most valued by the client.

Contents:

Private Wealth Law

Private Wealth Law
Pennsylvania
Leading Firms
Band 1
Cozen O'Connor
Gadsden Schneider & Woodward LLP
Heckscher, Teillon, Terrill & Sager, P.C.
Morgan, Lewis & Bockius LLP
Band 2
Ballard Spahr LLP
Senior Statespeople
Senior Statespeople: distinguished partners
Schneider Pam H *Gadsden Schneider & Woodward*
Leading Individuals
Band 1
Lipschutz Lester *Cozen O'Connor*
Mirabello Francis J *Morgan, Lewis & Bockius LLP*
Sager Margaret *Heckscher, Teillon, Terrill & Sager*
Sanborne Marilyn *Ballard Spahr LLP*
Terrill, II John A. *Heckscher, Teillon, Terrill & Sager*
Band 2
Chane Lawrence *Blank Rome LLP (ORL) ◊*
Friedman Robert *Cozen O'Connor*
Heintz Paul *Obermayer Rebmann Maxwell (ORL) ◊*
Hiscott Thomas *Heckscher, Teillon, Terrill & Sager*
Pietragallo William *Pietragallo Gordon (ORL) ◊*
Stryker Nina *Obermayer Rebmann Maxwell (ORL) ◊*
Ufberg Amy *Dechert LLP (ORL) ◊*
Wolff Peter *Pietragallo Gordon Alfano (ORL) ◊*
Woodward W. Steve *Gadsden Schneider*
◊ (ORL) = Other Ranked Lawyer.
Alphabetical within each band. Band 1 is highest.

Band 1

Cozen O'Connor

Cozen O'Connor is a full-service international firm with a well-established presence in Pennsylvania. The firm has offices in Pittsburgh and Philadelphia.

"They have the breadth and depth to deal with anything," comments one source. *"Cozen O'Connor has been exemplary on service, and never a complaint on billing practices and decisions,"* says an interviewee.

Notable practitioners

Lester Lipschutz has *"a great bedside manner and comportment,"* says one source. Another says that *"he clearly deals with high net worth individuals on a regular basis: he's very smooth, his approach varies appropriately, and he's good with complex concepts."*

Robert Friedman is a highly experienced private wealth lawyer who advises high net worth clients on estate, trust and tax planning. *"He's got excellent clients, he's super smart, collegial and he works for total solutions,"* says one interviewee.

Gadsden Schneider & Woodward LLP

Gadsden Schneider & Woodward is described as *"excellent"* by one source. This boutique firm offers a wide array of private client services, including estate planning, tax issues and trust matters.

Notable practitioners

Pam Schneider has a formidable depth of experience in the private wealth field. *"She's a real expert in everything. She's very academic in her approach,"* says one source.

Steve Woodward is *"a superb lawyer, and very practical,"* according to one source. An interviewee says: *"He is very, very smart and reasonable, with a sensible approach to collaboration."* Another comments: *"He's an exceptional lawyer and very respected in this field."*

Heckscher, Teillon, Terrill & Sager, P.C.

Heckscher, Teillon, Terrill & Sager has a strong reputation for private wealth work in this jurisdiction. *"It's a well-known firm, notable for its leadership and high net worth matters,"* says one source.

The team handles the full range of private client matters, including estate and tax planning. *"There's an astonishing depth and scope to the practice,"* reports an interviewee.

Notable practitioners

Margaret Sager is *"a good advocate for her clients,"* says one source. Another reports that *"she's a very high-quality attorney"* who is *"just exceptionally knowledgeable about estate planning."*

John Terrill is described as *"very well-qualified in estate planning, deft with high net worth individuals, and highly regarded and knowledgeable"* by one source. He handles private wealth matters for high net worth clients.

Thomas Hiscott advises clients on private wealth matters, including estate planning and administration. *"He's a very sound, sensible lawyer,"* says one source, while another describes him as *"so knowledgeable and careful."*

Morgan, Lewis & Bockius LLP

Morgan, Lewis & Bockius advises affluent clients on a wide range of private wealth matters. *"They're always the law firm of choice for us,"* says one source. *"They have an incredible reputation, not only for dealing with local issues – they're nationally recognisable as well." "Morgan Lewis is the complete package of top-level lawyers with clear communication and billing,"* reports another interviewee. *"The lawyers work together seamlessly and communicate for the overall benefit of the client."*

Notable practitioners

Francis Mirabello is highly sought after for private client matters, including estate planning and tax matters. *"He's a very capable and accomplished lawyer,"* reports one source.

Band 2

Ballard Spahr LLP

Ballard Spahr is a well-known national firm with a long-established Philadelphia office.

The firm's private client services team handles private wealth matters for high net worth clients. *"The firm continues to have a high profile,"* comments an interviewee. *"It's a terrific group of knowledgeable people."*

Notable practitioners

Marilyn Sanborne *"would be at the top of anyone's list – she's a truly leading individual,"* says one source. She is highly sought after for estate planning work.

Other Ranked Lawyers

Lawrence Chane advises high net worth clients on private wealth matters, including estate planning, tax issues and wealth transfer.

Paul Heintz is *"very well respected in the community"* for estate planning work, comments one source. Another calls him *"one of the deans of the local Bar, and eminent."*

William Pietragallo is a well-established private client lawyer. *"He is very seasoned,"* says one source. *"He's seen a lot and does not rush to judgement. He is calculating and careful while also being an aggressive litigator."*

Nina Stryker is a highly respected private client practitioner. She is described as *"very active in the market"* by one source, while another comments that *"she does an excellent job."*

Amy Ufberg is *"businesslike with the personal touch and very detail-oriented,"* says one source. Another comments: *"She is very thorough, detail-oriented and organised. She is one of the leaders in the Philadelphia estate planning community."*

Peter Wolff is *"an excellent trial attorney who leaves no stone unturned,"* according to one source. Another says: *"Peter is very responsive and thorough, and has an indefatigable work ethic."*

Private Banks

Private Banks
Leading Firms
Brown Brothers Harriman & Co.
Goldman Sachs
JPMorgan Chase & Co.

Brown Brothers Harriman & Co.

Brown Brothers Harriman & Co is praised for having *"a truly local approach"* by one market source. *"It's a strong regional player. It offers a combination of commercial banking and wealth management,"* says an interviewee, adding: *"It's a private company with that more personal feel as a result."*

This leading financial institution's private banking offering includes assisting clients with investments, trusts and philanthropic plans. It also provides wealthy individuals and families with wealth planning advice and credit facilities.

Key contact:

Ross Bruch, Vice President – Private Wealth Management

Goldman Sachs

Goldman Sachs offers private banking services to affluent families and individuals across Pennsylvania.

"They have incredible resources. I respect them so highly, they hire great people," says a commentator.

Key contact:

Clifford Schlesinger, Managing Director

JPMorgan Chase & Co.

J.P. Morgan has a strong presence in Pennsylvania, with offices in both Philadelphia and Pittsburgh. The bank offers trusts, estate and wealth planning advice and investment services, as well as personal banking and loans.

Key contact:

Stephen Wright, Managing Director and Mid-Atlantic Region Head

Wealth Managers

Wealth Managers
Leading Firms
The Fairman Group
Glenmede Trust Company, N.A.
PNC Wealth Management

The Fairman Group

The Fairman Group offers investment advice and financial planning to high net worth individuals and families. The respected family office also provides tax planning and compliance assistance.

Key contact:

Roy Fairman, Managing Partner

Glenmede Trust Company, N.A.

Glenmede Trust Company is *"a big player in the Philly market,"* according to a wealth manager. *"It's a smaller group founded to help high net worth families particularly. Virtually everybody with any client-facing responsibilities is a lawyer, which is such a spectacular feature,"* observes an interviewee.

The firm's respected advisers assist wealthy clients with investments and wealth planning matters. They are described as *"thoughtful"* and are notable for offering *"high-quality trust administration and client management."*

Key contact:

Lisa Whitcomb, Managing Director and Director of Wealth Strategy

PNC Wealth Management

PNC Wealth Management is a major wealth management group with a strong presence in the state and a *"good client base."*

PNC offers investment, wealth management and trusts and estates services, and its Hawthorn brand works specifically with ultra-wealthy clients. *"We have a longstanding relationship. They are careful, and sensible advice is given to our mutual clients,"* says a market source.

Key contact:

Nicole M. Perkins, Executive Vice President and the Managing Executive of Hawthorn, PNC Family Wealth

IVINS, PHILLIPS & BARKER

www.ipbtax.com **tel:** +1 202 393 7600 **fax:** +1 202 393 7601

Managing Partner: Eric R. Fox
Number of partners: 17 Number of attorneys: 31

Firm Overview:

Ivins, Phillips & Barker is exclusively engaged in the practice of federal tax, benefits and compensation, and estate and gift tax law. The firm's lawyers are nationally recognised to be among the best and brightest, bringing years of government service and corporate experience to bear on its clients' tax problems. IPB provides seasoned counsel in all major areas of tax law, and offers prompt and efficient attention, whether with respect to the most detailed and intricate of issues, or for rapid responses to emergency situations. Founded by two of the original judges on the United States Tax Court in 1935, its decades of focus on the intricacies of the Internal Revenue Code and Department of Labor regulations have led numerous Fortune 500 companies, as well as smaller companies, tax-exempt organisations, and high net worth individuals to rely on IPB for answers to their most complicated and sophisticated tax planning problems as well as for complex tax litigation. IPB's experience has taught it that while the tax code is ever-evolving, for most taxpayers it remains dauntingly complex; the firm's attorneys keep up on the latest developments in tax reform so that they can provide timely advice on how changes to the law will affect clients and their businesses.

Main Areas of Practice:

Tax:
- Tax Planning & Advisory Services
- International Tax
- Tax Controversies
- Tax Accounting
- Federal Tax Policy & Advocacy
- Arbitration & Litigation Support

Estate Planning:
- Gift & Estate Tax Planning
- Income Tax Planning
- Wills and Trusts
- Estate Administration
- Privately Held Businesses
- Exempt Organisations & Charitable Giving
- International Planning & Compliance

Benefits & Compensation:
- Retirement Plans
- Executive Compensation
- Health & Welfare Plans
- Mergers & Acquisitions
- Payroll Tax & Fringe
- Plan Investments
- Vendor Contracting & HR Outsourcing
- ERISA Litigation

Key Clients:
- IBM
- GE
- Milliken Company
- AIG
- Blackstone
- ConEdison
- Jacobs Engineering

OFFICES

USA

DISTRICT OF COLUMBIA

WASHINGTON, DC: 1717 K Street, NW, Suite 600, 20006
Tel: +1 202 393 7600
Fax: +1 202 393 7601
Email: ipb@ipbtax.com

Contact Name:

Siobhan O'Connor, Director of Business Development
Tel: 202 662 3456
Email: soconnor@ipbtax.com