Chambers
High Net Worth
2020

Leading HNW Professionals worldwide

USA Minnesota

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
Minnesota
Leading Firms
Band 1
Dorsey & Whitney LLP
Fredrikson & Byron PA
Lathrop GPM
Band 2
Best & Flanagan LLP
Faegre Drinker
Maslon LLP
Stinson LLP
Taft Stettinius & Hollister LLP
Senior Statespeople
Senior Statespeople: distinguished partners
Brand Steve A. *Robins Kaplan LLP (ORL)* ◊
Leading Individuals
Band 1
Berens William *Dorsey & Whitney LLP*
Brody William J *Fredrikson & Byron PA*
Burns Ann B *Lathrop GPM*
Link Susan *Maslon LLP*
Logstrom Koci Bridget *Dorsey & Whitney LLP*
Shannon David J *Faegre Drinker*
Shearen Mary *Best & Flanagan LLP*
Slye Terry *Taft Stettinius & Hollister LLP*
Band 2
Breckner Andrea *Olson & Breckner, P.A. (ORL)* ◊
Day Eileen *Stinson LLP*
Halferty Laura *Stinson LLP*
Litman Stephen *Stinson LLP*
Miller Sonny *Dorsey & Whitney LLP*
Parks Charles *Faegre Drinker*
Sampson Michael *Maslon LLP*
Schoonover Dale J *Fredrikson & Byron PA*
Seybolt Cameron *Fredrikson & Byron PA*
Van Sambeek Mavis *Ballard Spahr LLP (ORL)* ◊
Band 3
Frank Bradley *Barnes & Thornburg LLP (ORL)* ◊
Lamm James *Lathrop GPM*
Lammers Jennifer *Best & Flanagan LLP*
Shea Matthew J. *Lathrop GPM*
◊ (ORL) = Other Ranked Lawyer.
Alphabetical within each band. Band 1 is highest.

Band 1

Dorsey & Whitney LLP

Dorsey & Whitney's trusts and estates team provides advice to high net worth clients regarding estate planning and administration, trust matters and tax planning.

Sources praise the team. *"They have a strong depth of team for sure,"* says one interviewee, and another adds: *"They are all extremely well respected and are all very good at what they do."* Another commentator notes that *"the work they do is consistently good."*

Notable practitioners

William Berens advises high net worth clients on estate planning and administration, business succession planning and trust administration. He is highly regarded for his experience in this area. *"He is known as one of the pre-eminent experts in the Twin Cities,"* notes a source. Another interviewee adds: *"He is one of the top lawyers I have ever met, he has a terrific practice."*

Bridget Logstrom Koci advises wealthy clients on estate planning and trusts disputes. A source enthuses: *"She is absolutely top-tier, she really understands tax law. Part of her practice is fiduciary litigation; so when she's planning, that is foremost in her mind. She is really excellent."*

Sonny Miller advises on estate planning and administration, trust administration and tax matters. A source explains: *"His clients are all over the place; he does international tax planning – he is a trusted adviser."* Another interviewee says that *"his ability to talk about complex concepts in an attainable way"* has always been impressive. A fellow attorney adds that Miller is *"practical, and thinks outside the box to achieve client goals."*

Fredrikson & Byron PA

The trusts and estates group at Fredrikson & Byron is *"among the best in town,"* says an impressed source, who explains that *"they have some really great lawyers and they practice at the top of their game."*

Another interviewee describes it as *"the strongest estate planning and private client team in the market,"* and a fellow Minnesota attorney says it is *"a great group; they represent a lot of smaller family businesses and have that as a bit of a speciality."*

Notable practitioners

William Brody has a strong reputation for his wealth transfer experience. A source enthuses: *"He is that rare person that can do everything well, he is technically proficient and also a trusted adviser."* A fellow attorney adds: *"He has a very good reputation in the community, he is a very good advocate."*

Dale Schoonover represents high net worth individuals and families as well as family offices on a range of estate and trust matters. An interviewee enthuses: *"He is one of those people with the complete package; he is really smart, a really good lawyer, he also makes clients feel comfortable."*

Cameron Seybolt advises wealthy clients on estate planning and administration, and tax matters. His clients include family offices, family business owners, and individual and corporate executors and trustees. A fellow attorney says: *"He's a wonderful guy, he's very easy to work with and very knowledgeable."* Other sources say he is *"an excellent lawyer."*

Lathrop GPM

Gray Plant Mooty's trust, estate and charitable planning group advises on a comprehensive range of wealth transfer matters. Sources say it is *"a strong estate planning team."*

One interviewee highlights the team's expertise, saying that *"they have very, very strong lawyers,"* and another notes the depth of the team, reporting that *"they have a number of people across different experience levels."*

Notable practitioners

Ann Burns is universally well regarded for her expertise in the area. She advises on a range of matters, including estate planning and administration, business succession planning and charitable planning. A source says: *"She is an excellent lawyer, she is wonderful,* *thoughtful and engaging."* A fellow attorney adds that *"she is extremely well regarded and for good reason."*

James Lamm advises wealthy clients on estate planning and tax matters. He wins praise both for his technical ability and his community-minded approach to this work. *"He is the technician, a tax guru, a maestro,"* says one source, and another reports that *"he is technically incredibly sound and tireless in his work for his clients and the greater community."* A fellow attorney summarises: *"He is one of the best technical estate planning attorneys, and he'd give you the shirt off his back; it's a nice combination."*

Matthew Shea advises wealthy individuals, families and business owners on estate planning and administration, business succession and tax matters. A source praises his demeanour and way with clients, adding: *"He is an exceptional lawyer."* Another interviewee says: *"He is a smart attorney, he is thorough and knows estate planning."*

Band 2

Best & Flanagan LLP

Best & Flanagan provides a comprehensive range of services to high net worth clients, including estate and trust administration, business succession planning and trust litigation. The team also advises on conservatorship and guardianship matters.

A source notes: *"Estate planning is part of the DNA of that firm, and it has a lot of credibility and respect."*

Notable practitioners

Mary Shearen advises on estate planning, probate and trust matters. Her clients include high net worth individuals, trustees and beneficiaries. A source enthuses: *"She is fantastic, she is just a top-notch attorney. She's a smart, smart woman and does a great job."* A fellow attorney adds: *"She is a brilliant advocate and clients really relate well to her and find her to be a trusted adviser."*

Jennifer Lammers advises on estate planning, probate and trust administration and business succession planning. She also advises on elder law and represents clients in trust disputes. One source says Lammers is *"fabulous,"* and another says she is *"practical, she is responsive and knows her stuff."*

Faegre Drinker

The wealth management team at Faegre advises high net worth clients on estate planning and administration and trust administration. The attorneys also represent beneficiaries and trustees in trust litigation.

A source enthuses: *"It's a great team, the individuals there are phenomenal."*

Notable practitioners

"Top-tier" attorney **David Shannon** is *"a really good lawyer who understands substantive tax law completely,"* says a source. Shannon advises on estate planning and administration, business succession planning and trust administration. A fellow attorney notes that *"he is very smart and very thoughtful, he just gives people good, solid advice."*

Charles Parks advises on estate and trust administration amongst other tax and wealth transfer matters. A source notes: *"He remembers technical details about cases and statutes; if there's a thorny issue, he's going to know the law and going to be able to work through it."*

Maslon LLP

Maslon's estate planning team advises high net worth clients on a comprehensive range of matters including charitable planning, trust litigation and tax planning.

Sources consider it a *"great"* firm with a *"very sophisticated practice"* in this area.

Notable practitioners

Susan Link advises high net worth clients on estate planning, probate and trust administration. A source enthuses: *"She is a fantastic attorney, she knows how to communicate with her clients and is very practical."* Another interviewee says Link is *"a really solid lawyer – clients love her, she is great."*

Michael Sampson is chair of the firm's estate planning group. He advises on a range of issues including estate planning and administration, charitable planning and business succession planning. He also advises on trust administration and tax matters.

Stinson LLP

The team at Stinson advises high net worth clients on estate planning, charitable planning and business succession. The attorneys also have considerable experience advising individual and corporate fiduciaries on administration matters.

One source says that the firm has *"really strong practitioners – it's a really strong group,"* and another adds that *"they are well thought of in the community."*

Notable practitioners

Eileen Day advises high net worth individuals and families, business owners, corporate fiduciaries and charitable organisations on a range of estate and tax planning matters. A source says: *"She has a very good reputation and provides good client service."* Another interviewee adds that she's a *"good practical lawyer."*

Laura Halferty advises on estate planning and business succession planning. Her clients include wealthy individuals and families, and individual and corporate fiduciaries. A source says Halferty is *"a great lawyer"* who is *"really good at conflict and litigation matters."* Another interviewee adds that *"she practises at a high level."*

Stephen Litman advises high net worth individuals and families as well as closely held family businesses on tax matters, business succession planning and probate and trust adminstration. A source notes: *"He has a very good reputation and is very thoughtful."*

Taft Stettinius & Hollister LLP

Briggs & Morgan merged with Midwest regional firm Taft Stettinius & Hollister this year. The team at Taft advises on estate planning and administration, trust litigation and tax matters. The attorneys advise high net worth individuals and families, business owners and charitable organisations.

A source says that it is *"a very well-known and respected group,"* and another adds: *"They are really good people."*

Notable practitioners

Terry Slye is an *"extremely technically competent"* attorney who advises high net worth clients on a range of matters, including estate planning and administration, trust adminstration and tax matters. He also advises non-profit organisations. A source enthuses: *"He is fabulous, there is no better lawyer out there."*

Other Ranked Lawyers

Steve Brand of Robins Kaplan LLP has extensive experience advising high net worth clients on estate planning and administration and trust administration. Sources describe him as *"a top-tier lawyer"* and *"a senior statesperson in our community – he has clearly been a thought leader."*

Andrea Breckner of Olson & Breckner, P.A. advises on a comprehensive range of matters including estate planning and adminstration, charitable planning and tax matters. A source says: *"She's a very good lawyer, and is very responsive to her clients."*

Bradley Frank of Barnes & Thornburg LLP advises high net worth individuals and closely held business owners on trusts, wills and charitable planning, among other wealth transfer matters. Sources say he is *"incredibly collaborative, responsive and intelligent,"* as well as being *"really practical."*

Mavis Van Sambeek of Ballard Spahr LLP advises wealthy clients on estate planning and trust administration, and also advises individual and corporate fiduciaries. A source says that *"her knowledge and her ability to analyse issues"* are very impressive. Another adds that *"she is a thought leader in the community."*

Accountants & Tax Advisers

Accountants & Tax Advisers
Leading Firms
Deloitte
Redpath and Company
Leading Individuals
Holsten Michael *Deloitte*
Redpath James *Redpath and Company*

Deloitte

Deloitte is *"terrific,"* according to a source, who continues: *"They have a strong emphasis in international estate planning. They are really good team players and are really smart."* Another interviewee adds: *"They have really good resources – for very, very complex and high-level matters you can't beat them."*

Multiple sources praise tax director Michael Holsten. *"He is very good. I would say that he is the guy with the broad-based knowledge who sees the whole picture. He's practical,"* says an interviewee. Another commentator adds: *"I like him a lot. He is a really great team player, he's a really good communicator both with the clients and with the other advisers. He makes sure everyone is on the same page and understands what the others are doing."*

Key contact:

Michael Holsten, Tax Director

Redpath and Company

Minnesota CPA firm Redpath and Company is *"very impressive"* and *"does a lot of high-level work,"* according to sources. *"They are really understanding of the motivation and the psyche of the entrepreneur business owner, they are not just proposing business strategies,"* explains an interviewee, adding: *"They understand how they are going to operate and whether they will be something the owner can live with."*

Several local commentators praise Jim Redpath. *"He is one of those people with the technical expertise and the personality,"* says an interviewee: *"He is able to be practical and technical depending on what the situation requires."* Another observer states that Redpath *"is smart, practical and has good emotional intelligence with clients."* Gloria McDonnell is also highlighted, with a source describing her as *"excellent,"* adding: *"I think she understands tax law very well, she's easy to talk to and very approachable."*

Key contact:

James Redpath, Tax Partner and Client Manager

Private Banks

Private Banks
Leading Firms
Bremer Bank

Bremer Bank

Bremer Bank is *"the best private bank in town,"* enthuses an impressed source, who also says that *"it is a remarkable bank."* A source says: *"They are very responsive to clients, which is a lot of comfort to them,"* says a local commentator, adding: *"They do a good job on the investment side, and they do a good job communicating what they're doing and why they're doing it."*

An attorney praises CEO Jeanne Crain, saying: *"She is exceptional, she is incredibly competent, she commands the room. She is incredibly strategic and thinks ahead, she is ten steps ahead of everyone else. She is a really terrific, wonderful professional."* Another source highlights Randall Propp, saying: *"He is excellent, he is an excellent trust administrator and is also really wonderful to work with."*

Key contacts:

Jeanne Crain, President and CEO

Randall Propp, Wealth Management Adviser

Wealth Managers

Wealth Managers
Leading Firms
Meristem Family Wealth

Meristem Family Wealth

Meristem Family Wealth is a *"really exceptional"* multi-family office which advises wealthy clients on investments and also has an affiliated South Dakota trust company. *"I'm always impressed by them,"* says an attorney, adding: *"Their clients love them. They are very responsive to the client, they deliver what the client wants them to deliver. They are also easy to work with from an adviser's standpoint."*

"They have a really great approach to family office work, they are great investment people too – you can put them in with any of the big investment houses," states a market commentator, who adds: *"They also have a family office approach that is very values-based; they spend a lot of time with clients finding out what the client wants to accomplish. The relationship is driven from the client side, and they do a lot of meetings with multiple generations of the family."*

Key contacts:

James Robbins, Partner and Senior Client Adviser

Jon Crow, Partner and Senior Client Adviser

Anne Novak, Client Adviser and Vice President, Meristem Trust Company