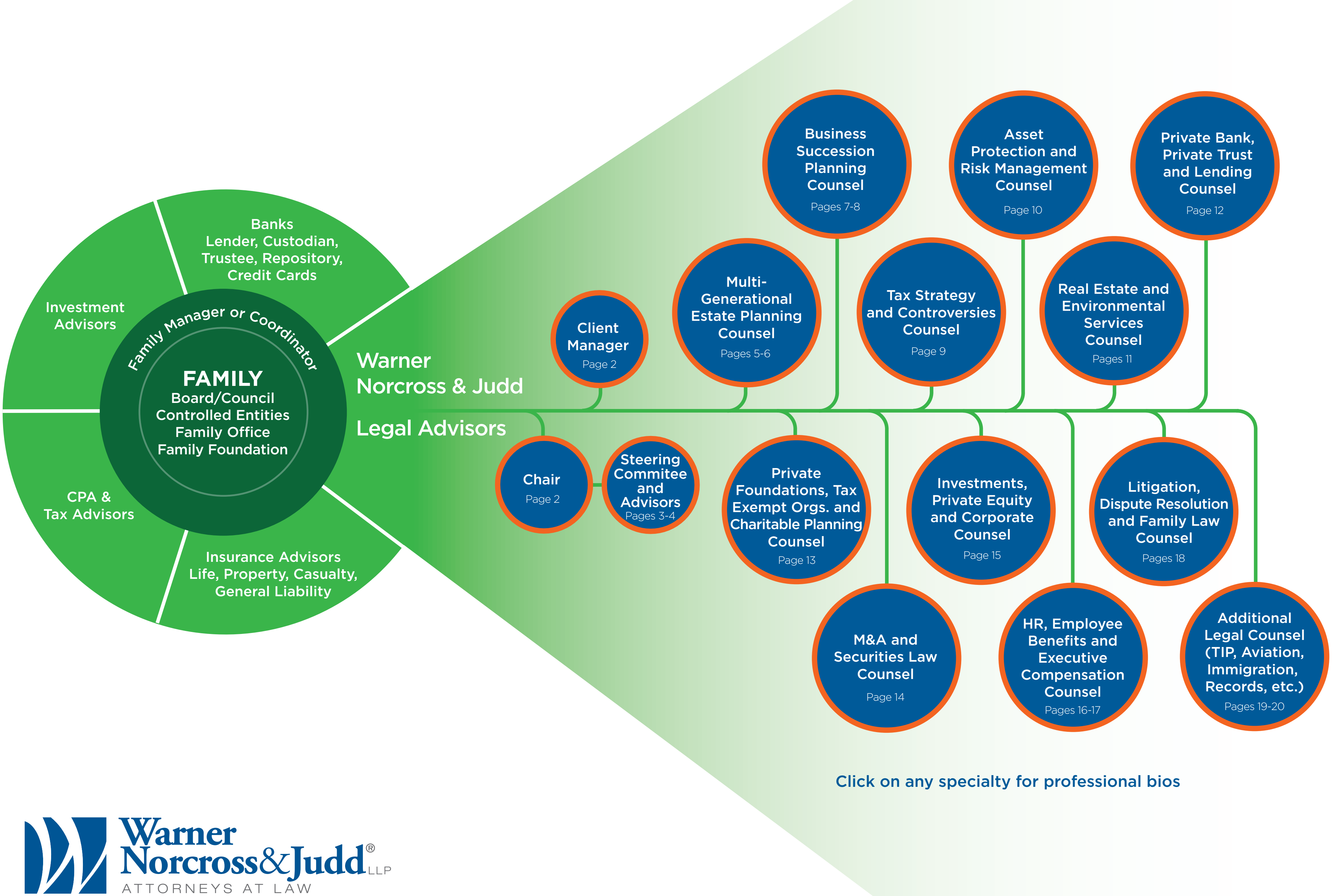

Click on any specialty for professional bios

Warner Norcross & Judd LLP
ATTORNEYS AT LAW

Client Manager

The pillar of our firm is providing value to clients. Our compensation system incentivizes us to have the best person assigned for every job for every client. This includes the designation of a client manager who oversees the overall delivery of legal services to a client. The client manager may be one person or, in some circumstances, two selected by the firm and with the client's input, if desired. We are always seeking the right fit for every role. Our expectations for client manager are very high. If clients ever have concerns we urge them to discuss the concerns with the chair of the Family Office Industry Team or the managing partner of the firm.

Chair

MARK K. HARDER

Mark Harder chairs the Family Office Practice. He represents many family-owned businesses in a variety of industries, including family offices and their respective family members. He serves many clients as their lead trusted advisor. In that capacity, Mark provides counsel regarding strategic planning, daily operations, the successful transition of ownership and management to future generations and a wide variety of estate planning services. Those services include customized multi-generational trust structures and numerous business and trust administration services. Mark served as the chair of the Michigan Trust Code Committee, which drafted the Michigan Trust Code, effective in 2010.

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BRUCE C. YOUNG

Bruce Young, a member of the Family Office Practice steering committee, has served as a trusted advisor to family businesses for more than 30 years, focusing on corporate and transactional work and succession planning. Bruce understands family businesses because he's a third-generation participant in one. For more than two decades, Bruce has served as lead counsel to one of the largest family offices in Michigan. He is former chair of the firm's the Closely Held Business Group and serves on the board of the Family Business Alliance.

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Bill Boer, an advisor to the Family Office Practice, is the president and founder of Grey Dunes, an independent family office advisory firm (www.greydunes.com). Grey Dunes assists families and their members in the areas of strategic planning, investment management, family philanthropy and office formation and operation. Bill previously served as vice president and chief operating officer of RDV Corporation, the family office of the Richard M. DeVos family (co-founder of Amway Corporation and owner of the NBA's Orlando Magic).

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BRUCE CLEARING SKY CHRISTENSEN

Bruce Clearing Sky Christensen, an advisor to the Family Office Practice, has served as the executive director of the firm for more than 30 years. He has participated in strategic planning, pricing, structuring and policy-making at every level of the firm, including practice groups, industry groups, offices outside Grand Rapids and the overall firm level. Bruce assists in keeping the firm focused on client service, exceeding expectations and achieving excellence. He served on the Family Office Task Force and helps to monitor client satisfaction.

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STEPHEN C. WATERBURY

Steve serves as legal counsel to a variety of Michigan businesses, including multigenerational family businesses. He has a general business practice with a focus on mergers and acquisitions and has completed many family business acquisition transactions. Steve also provides family businesses with succession, governance and antitrust counseling. He co-chairs the Mergers and Acquisitions Practice Group.

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Paul Jackson's practice focuses on federal and state taxation of corporations, S corporations, LLCs, partnerships, and individuals. He has represented high-value family-owned companies in complicated reorganization transactions, including mergers and acquisitions. He is co-author of the tax issues chapter of "Advising Closely Held Businesses in Michigan" and a frequent speaker on Subchapter S corporations, LLCs, and partnerships.

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JAY A. KENNEDY

Jay Kennedy has focused his practice on tax and estate planning matters for more than 33 years and is a former chair of the State Bar of Michigan Taxation Section. He has dealt with sophisticated reorganizations and other tax planning for businesses. Jay also has guided family entities and their individual owners through difficult IRS audit matters. Jay became a Certified Public Accountant in 1981 while working at a "Big 8" accounting firm, where he served as the tax manager for one of the largest family offices in Michigan.

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Scott Hubbard has 25 years of experience assisting families and family enterprises, trusts and estates in managing environmental liability risks associated with the purchase, sale and leasing of property and associated planning issues. Scott, who has served as an environmental liaison to the firm's Trusts and Estates Practice Group, tracks the ever-changing regulatory landscape to identify and act upon new opportunities and challenges. He is former chair of the firm's Resources, Energy and Environmental Practice Group.

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Chris Meyer has advised family offices and the families they serve on numerous real estate-related issues, including the buying and selling of commercial and luxury residential real estate, property tax valuation appeals, property tax uncapping strategies and appeals, property tax exemptions for charitable endeavors and zoning matters unique to luxury estates.

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Andy Hakken practices in the areas of commercial loans and tax-exempt financing transactions, representing both lenders and borrowers. He has documented and negotiated a variety of credit transactions, from intra-family loans to tax-exempt industrial revenue bonds for the benefit of family businesses. Andy is former chair of the Commercial Finance Practice Group.

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Rodney Martin regularly advises clients regarding bank regulatory issues involving the formation of private banks as well as fair lending, financial privacy, Bank Secrecy Act and other compliance matters. He is chair of the Financial Services Group and a member of the firm's Data Solutions Group. In addition, he is the firm's Diversity Partner.

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Jeff Ott has more than 20 years of experience helping family offices and high-net-worth individuals navigate federal and state securities laws that apply to investment activities as well as the structure and operation of family offices. Jeff also has extensive experience representing banks and trust companies in their formation and all aspects of their operations concerning compliance with banking, fiduciary and private trust company laws. He has also represented many businesses and families in merger and acquisition transactions and general corporate matters. Jeff chairs the firm's Reporting Companies and Registered Offerings Group.

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Mark Wassink frequently represents both lenders and borrowers in commercial loan transactions. He has represented families and trusts in various intra-family loans for the benefit of family businesses. Mark also has documented transactions involving intra-family loans, trust loans relating to real estate acquisitions and the payment of estate taxes.

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Jeff Power has formed well over 100 family private foundations and represents a majority of the large family foundations in West Michigan. He provides highly specialized legal, tax and practical guidance in foundation governance, asset management and grantmaking. Jeff is the firm's expert in charitable and planned giving techniques, including donor advised funds, charitable remainder trusts, charitable lead trusts, bargain sales, charitable gift annuities and conservation easements. Jeff also oversees federal tax compliance matters for clients with foreign accounts.

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Shane Hansen has practiced securities and banking law for 30 years with a specialty in broker-dealer and investment adviser regulation. He advises family offices about their third-party securities and business brokerage arrangements, investment management arrangements, as well as how family offices may avoid being regulated under federal and state laws as an "investment adviser" if they self manage the family's investments. Shane co-chairs the Funds and Investment Services Practice Group.

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Mike Jones routinely assists family offices with investment opportunities, including all aspects of preferred stock and convertible debt transactions. He also helps family offices with mergers, acquisitions and divestitures. He co-chairs the Mergers and Acquisitions Practice Group.

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Jeff Ott has more than 20 years of experience helping family offices and high-net-worth individuals navigate federal and state securities laws that apply to investment activities as well as the structure and operation of family offices. Jeff also has extensive experience representing banks and trust companies in their formation and all aspects of their operations concerning compliance with banking, fiduciary and private trust company laws. He has also represented many businesses and families in merger and acquisition transactions and general corporate matters. Jeff chairs the firm's Reporting Companies and Registered Offerings Group.

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Steve serves as legal counsel to a variety of Michigan businesses, including multigenerational family businesses. He has a general business practice with a focus on mergers and acquisitions and has completed many family business acquisition transactions. Steve also provides family businesses with succession, governance and antitrust counseling. He co-chairs the Mergers and Acquisitions Practice Group.

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LOREN ANDRULIS

Loren Andrulis, a member of the Family Office Practice steering committee, helps family offices properly structure investment partnerships and LLCs. Loren also helps family offices evaluate and hire asset managers and investment advisors, and provides advice on hedge fund and private equity investment opportunities, including negotiation of additional participation rights and exposure limitations. He also provides advice on strategies to limit property tax uncapping and transfer tax liabilities in the context of real estate transfers and gifts of ownership interests. Loren is co-chair of the firm's Funds and Investment Services Group.

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CAMERON S. DELONG

Cam DeLong has more than 27 years of experience assisting family-owned and closely-held businesses with general business planning. He can help family offices with choice of entity decisions, reorganizations, mergers, acquisitions, joint ventures, sales, financing, contracts, economic incentives, and succession planning. Cam also practices international business law and is chair of the firm's International Business Group.

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BRUCE C. YOUNG

Bruce Young, a member of the Family Office Practice steering committee, has served as a trusted advisor to family businesses for more than 30 years, focusing on corporate and transactional work and succession planning. Bruce understands family businesses because he's a third-generation participant in one. For more than two decades, Bruce has served as lead counsel to one of the largest family offices in Michigan. He is former chair of the firm's the Closely Held Business Group and serves on the board of the Family Business Alliance.

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JONATHAN P. KOK

Jon Kok specializes in labor relations and employment compliance, which includes such activities as counseling, drafting contracts, collective bargaining and litigation. He has worked with many family offices and understands the unique employment law needs of a family office. Jon also is chair of the firm's Labor and Employment Group.

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ANTHONY J. KOLENIC, JR.

Tony Kolenic represents employers in all facets of employee benefits and executive compensation. He regularly counsels family office clients regarding compliance with ERISA, the Internal Revenue Code and various labor and securities laws impacting 401(k) plans, defined benefit plans, health care plans and executive compensation.

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MARY JO LARSON

Mary Jo Larson focuses her practice on employee benefits law. She has advised family offices on designing and implementing executive compensation and other employee benefits to ensure that the interests of key employees are aligned with the interests and goals of the families they serve. She also has extensive experience with the investment industry in connection with advising fiduciaires investing assets of retirement and 401(k) plans.

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HEIDI A. LYON

Heidi Lyon focuses her practice on retirement plan and executive compensation matters. She routinely counsels family businesses on plan creation, design, compliance, administration, governance and contracting with service providers. Her work also includes assisting family businesses with succession planning through the establishment and maintenance of Employee Stock Ownership Plans (ESOPs). Heidi is chair of the firm's Employee Benefits/Executive Compensation Group.

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LOUIS C. RABAUT

Lou Rabaut concentrates his practice in employment and labor law. He has counseled family offices on such issues as employment contracts, compensation practices, difficult employment terminations and workplace policies, including confidentiality policies to protect family privacy.

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JUSTIN W. STEMPLE

Justin Stemple focuses his practice in employee benefits law, with a special emphasis on retirement plans and deferred compensation. Justin can help family offices create retirement plans that maximize contributions for family members, specify coverage and eligibility for related entities and transition ownership through employee stock ownership plans (ESOPs).

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Karen VanderWerff concentrates her practice in employment law and occupational safety and health law. She advises family offices on employment-related issues, including employment agreements and employment policies, and conducts confidential investigations involving family law issues. Karen also provides guidance on applicable health and safety laws.

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Ed Bardelli is a litigator specializing in employment and commercial litigation. He has helped family offices with a wide range of employment issues, including those relating to executives and staff in a variety of settings. He has also counseled family offices on risk management, records retention and ways to avoid litigation. Ed is former chair of the Litigation and Dispute Resolution Practice Group.

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ANDREA J. BERNARD

Andrea Bernard is a litigator who has worked with many family businesses to resolve employment and commercial disputes. She has handled a variety of discrimination, harassment, wrongful discharge and other employment-related claims, as well as commercial and construction disputes, ranging from breach of contract to breach of warranty. She is also Warner Norcross's General Counsel, representing the firm in sensitive legal and personnel matters.

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BRIAN T. LANG

Brian Lang has more than a decade of experience representing clients across Michigan in family related negotiations and as lead trial counsel in family related disputes. This representation has included several sensitive and valuable will and trust contests and complex litigation regarding real property issues. He has also helped resolve disputes related to the control and division of charitable family foundations.

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RICHARD A. ROANE

Ric Roane focuses his practice on family law (divorce and related matters). He works with family office members on pre-marital planning, pre-nuptial agreements, divorce, custody, asset valuation and allocation and related domestic relations matters. His clients are high-net-worth individuals who are business owners, professionals or family legacy asset beneficiaries whom he guides through life's transitions.

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NAZLI G. SATER

Nazli Sater has 25-plus years of experience as a family law and divorce attorney. She handles complex asset division, including the valuation of various sized family-owned businesses, unique investment portfolios and more. Nazli has represented numerous family members in complex divorce matters involving large estates. Nazli is chair of the firm's Family Law/Divorce Group.

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DAVID L.J.M. SKIDMORE

David Skidmore is a litigator specializing in family disputes over gifts, trusts, estates and property ownership as well as matters involving fiduciary roles. David also handles and resolves disputes involving sensitive family matters. A member of the State Bar of Michigan's Probate and Estate Planning Council, and as a fellow in the American College of Trust and Estate Counsel. David is a frequent author and speaker on trust and estate litigation.

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CHARLES E. BURPEE

Chuck Burpee has assisted clients in developing intellectual property strategy for three decades. He helps family offices create and manage IP portfolios and develop unified IP strategies, including name protection, across commonly-owned companies. In addition to obtaining patents and trademarks, Chuck also evaluates the validity and scope of patents and trademarks and conducts IP due diligence in conjunction with mergers and acquisitions.

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Diane Currie is Warner Norcross's senior compliance consultant. She focuses on investment advisor compliance work and has provided operational support for several family offices. Prior to joining Warner Norcross, she owned her own consulting business, which helped family offices evaluate software solutions, maintenance of portfolio accounting records and comprehensive investment performance reporting. Diane is not licensed to practice law, so she works closely with and under the supervision of attorneys.

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Dan DeWitt has focused his practice on environmental law for 20 years. He regularly assists family enterprises and closely held businesses as they navigate the complex environmental regulations that apply to their operations and real estate ventures. As a regular part of his practice, Dan assists family businesses by performing environmental audits of ongoing operations and by conducting due diligence for new acquisitions.

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Angela Jenkins concentrates her practice in immigration law. She helps family businesses obtain temporary and permanent work visas to employ highly skilled foreign nationals in various fields, including engineering, health care and the arts. Angela also handles family-related visa matters, including obtaining U.S. permanent residence for foreign nationals who marry U.S. citizens, and advises clients regarding complex U.S. citizenship issues.

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R. SCOTT KELLER

Scott Keller practices intellectual property and Internet law and litigation, focusing on trademarks, copyrights, domain names and unfair competition. He has helped family offices develop and implement brand strategies and IP asset protection tailored specifically to each business within the family organization. Scott understands that one size does not fit all, not just between different family offices, but even within the components of the same family office. This individualized approach maximizes value by only committing the resources necessary to provide the appropriate level of protection for each IP asset. Scott is former chair of the firm's Technology and Intellectual Property Practice Group.

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Dawn Ward is a litigator with expertise in corporate defense, discovery and document management. She helps many of our family business clients create and implement document management programs, including record retention schedules, email and other electronic document policies. Her services apply to a wide variety of industries and types of records, from accounting and human resource records to aviation documents. Dawn is former co-chair of the firm's Data Solutions Group.

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