
Shartsis Friese Adds Premier Family Wealth Planning Practice

San Francisco, October 1, 2013 – Shartsis Friese LLP announced today that [Richard S. Kinyon](#), [Patrick McCabe](#), [April Hopkins Rox](#), and [Danielle T. Zaragoza](#), all formerly of Morrison & Foerster, have joined the firm to establish one of the premier family wealth planning practices in San Francisco. Kinyon and McCabe will be partners; Rox and Zaragoza will be Of Counsel.

The new [Family Wealth Planning Group](#) at Shartsis represents a wide range of U.S. and international individuals and families with varying life situations and life-stage needs, including among others: executives of public corporations, owners of closely held businesses, and entrepreneurs involved in start-up businesses.

The group provides sophisticated planning to not only reduce the tax burden but also to address specialized concerns such as business succession planning, planning for special needs beneficiaries, and providing incentives for younger generations to use their wealth wisely and in ways that contribute to their communities. Members of the group also assist individuals, families, private foundations, charitable organizations, and businesses to implement their philanthropic goals, representing some of the largest and best known foundations in California.

“We’re tremendously excited to have such a stellar group of lawyers – widely viewed as one of the top family wealth planning groups in California – come to Shartsis Friese,” said managing partner [Art Shartsis](#). “Adding estate planning to the firm has been one of our strategic priorities for some time, and having Dick, Patrick and their team join us is a home run. Their practice will be a strong complement to our core practice areas, including Real Estate, Investment Management, Corporate Finance, and Trusts and Estates Litigation, and will benefit many of our existing clients.”

“Morrison & Foerster is a fantastic firm and everyone there has been incredibly supportive,” Patrick McCabe said. “In moving to Shartsis, with so many synergies in play, we believe we’ve found the ideal firm for growing a practice like ours that serves individuals, families and nonprofits.”

“After so many very satisfying years at Morrison, it’s a big move for me and the rest of the team,” said Dick Kinyon. “But we are all very excited to be joining such a great group of lawyers at Shartsis, and we anticipate that the move will be well-received by our clients.”

“Given their high standing in the estate planning community, we’re looking forward to sharing the news about the new group’s arrival with our clients and helping our new partners grow their practice,” concluded Shartsis. “We believe that the Shartsis Friese model will continue to be attractive to big firm lawyers with elite niche practices who face challenges in supporting the billing rate pressure and leverage requirements that inevitably arise at all the largest firms.”

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About the new lawyers:

[Richard S. Kinyon](#) received his J.D. in 1965 from University of Minnesota Law School, where he served as Editor-in-Chief of the *Minnesota Law Review* from 1964 to 1965, and his B.A. from University of Minnesota in 1961. Kinyon has been active for many years in a number of professional organizations, including the Real Property, Probate & Trust Law Section of the American Bar Association, the Taxation and Estate Planning, Probate, and Trust Law Sections of the State Bar of California, the Estate Planning, Trust, and Probate Law Section of the San Francisco Bar Association, the American College of Trust and Estate Counsel, the International Academy of Estate and Trust Law, the San Francisco Estate Planning Council and the American Law Institute. Kinyon has been recognized by *SuperLawyers* since 2004 and *Best Lawyers in America* since 1987 as a leading lawyer in Trusts & Estates.

[Patrick R. McCabe](#) received his law degree, *magna cum laude*, from Cornell University in 1992, and his B.A., *cum laude*, in economics from the University of Utah in 1989. He served as an editor of the *Cornell Law Review* and was selected as a member of the Order of the Coif, the national law school honor society. McCabe is recognized in the 2013 edition of *Best Lawyers in America* for excellence in the field of Tax Law. He has also been

recommended as a leading lawyer by such clients' guides as *Chambers USA 2012* and *Legal 500 US 2012*.

[April Hopkins Rox](#) received her B.A., with distinction, from Stanford University in 1971, and her J.D. from Emory University School of Law in 1977. Rox was elected as a member of the Order of the Coif and the national law school honor society, and she served on the staff, and later as Notes and Comments Editor, of the *Emory Law Journal*.

[Danielle T. Zaragoza](#) received her law degree from the University of California, Davis, School of Law in 2003, where she served as an Editor for the *U.C. Davis Law Review* and was elected to the Order of the Coif. She received her B.A. from University of California, San Diego in 1998. Zaragoza served as the 2010 Chair of the Estate Planning, Probate and Trust Section of the Barristers Club of the Bar Association of San Francisco.

About Shartsis Friese

Founded in San Francisco in 1975, Shartsis Friese LLP has more than 60 lawyers. The firm has extensive trial and business litigation experience, including securities enforcement defense, and a complex transactional practice focused on investment advisers, hedge funds, mergers and acquisitions, corporate finance, securities, tax, venture capital, intellectual property, family wealth planning, and real estate. For more information visit www.sflaw.com.