



Structural Issues in Law Firm Management

January 28 – May 6, 2022

Presentations 9 – 10:00 a.m. (New York time)

Optional Breakout/Networking Sessions 10 – 10:30 a.m.

Course Materials

Structural Issues in Law Firm Management

A Program Organized by Fordham Law School and Mattos Filho Advogados

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Introduction

Structural Issues in Law Firm Management provides participants with the knowledge and tools to successfully manage law firms. Over the past decade, the legal industry has experienced intense transformation. Client needs and expectations continue to evolve, and law firms need to adjust the way they operate in order to meet these needs and expectations. To tackle the challenges of the new legal landscape, law firms must be based on a solid foundation focused on strategic decisions, a client-centric approach, and an employee-centered culture. We are delighted to build on the success of last year's inaugural program.

Structural Issues in Law Firm Management is different from other legal business management courses in that it brings together a unique body of speakers: real-world law practitioners who either manage a law firm or are directly involved in the executive decisions of law firms. The program also offers perspectives from accomplished in-house counsel to provide the client perspective on law firm management imperatives. The combined experience and expertise of these legal leaders will provide conceptual knowledge that is readily applicable to the daily challenges faced by program participants and their firms.

These materials include the program schedule, suggested readings for each session, and the presenters' biographical information. Participants are encouraged to consult these materials throughout the program and review the materials for each session in advance. Classes will meet via Zoom on Fridays, from January 28 through May 6, from 9 – 10:00 a.m. (New York Time). There will be an optional breakout session after each presentation, from 10 – 10:30 a.m., where you will have the opportunity to reflect on the information discussed and network with colleagues from around the world. We will provide more information separately on the optional in-person colloquium on May 12-13, 2022 (dependent on any health protocols in place at that time). A certificate of completion will be issued to participants who complete a minimum of 80% participation. NY and/or NJ CLE credit is available for attorneys licensed in those jurisdictions.

We are delighted to welcome each of you to this program and hope that you find it interesting and productive.



Amadeu Ribeiro
Mattos Filho



Toni Jaeger-Fine
Fordham Law School

Program Directors

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Materials

Friday, February 4 – Firm Strategies and Business Models Part I

[Maya Steinitz, The Partnership Mystique: Law Firm Finance and Governance for the 21st Century American Law Firm, William & Mary Law Review \(2022\) \(forthcoming\)](#)

[Greg Lambert & Marlene Gebauer, The Geek in Review Ep. 131 – Innovation Adoption – The Law Firm Field of Dreams \(Sept. 30, 2021\) \[Podcast with transcript.\]](#)

[Steering Law Firm Strategy, 3 The Practice \(May/June 2017\)](#)

[Demetrio Zema, Flipping the traditional law firm – the case for a decentralised model, Australasia Law Management Journal \(Feb. 2021\)](#)

Friday, February 11 – Firm Strategies and Business Models Part II

[William Pfeifer, Are Full-Service Law Firm Boutiques the Future?, The Balance: Small Business \(Dec. 5, 2019\)](#)

[Heidi K. Gardner, Collaboration in Law Firms: The New Wave of Client Service, 1 The Practice \(Sept./Oct. 2015\)](#)

[Mark A. Cohen, Are Law Firms Sustainable? It's The Model That Matters, Forbes \(Aug. 19, 2019\)](#)

Friday, February 18 and 25 – Compensation Systems Part I and II

[2022 Report on the State of the Legal Market: A Challenging Road to Recovery, Georgetown Law Center on Ethics and the Legal Profession, Thomson Reuters \(Jan. 2022\)](#)

[Lisa Rohrer and James W. Jones, Reforming Partner Compensation at Mattos Filho, Harvard Law School Case Study \(Aug. 10, 2015\)](#)

[John C. Coffee Jr., The Rise of the Mega-Law Firm: Some Reckless Reflections and Prickly Predictions, CLS Blue Sky Blog \(Sept. 17, 2019\)](#)

[John Roemer, BigLaw's lockstep compensation is declining in order to keep and attract talent, ABA Journal \(April 1, 2021\)](#)

[Law Firm Compensation: How are Partners Paid, Compensated, JD Supra \(June 16, 2021\)](#)

Friday, March 4 – Firm Structures and Governance

[Justine Rogers et al., Legal Project Management: Projectifying the Legal Profession, 3 Law, Technology and Humans 133-157 \(2021\)](#)

[Leslie Howard, The Flat Law Firm: Why Collaboration Over Hierarchy Makes Sense, Attorney at Work \(July 15, 2021\)](#)

Friday, March 11 – People Part I: Law Firm Leadership

[Ranjit Dam, A seat at the table — Why a Singapore law firm decided to make a nonlawyer an equity partner, Thomson Reuters Forum Magazine \(June 17, 2021\)](#)

[Edwin Smith, Rethinking “partners” for law firms: Creating an ecosystem for client value, Practice Innovations, Thomson Reuters \(Jan. 26, 2021\)](#)

[Quiet Leadership: A conversation with Susan Cain, 4 The Practice \(Nov./Dec. 2017\)](#)

Friday, March 18 – People Part II: Recruiting, Training, and Retaining Talent

[Greg Lambert & Marlene Gebauer, The Geek in Review Ep. 101 – How Mid-Level Associates Can Thrive at Law Firms – with Jennifer Bluestein \(Jan. 14, 2021\) \[Podcast with transcript.\]](#)

[Toby Brown, How to Get Diversity from Your Law Firms in One Easy Step, 3 Geeks and A Law Blog \(Nov. 10, 2020\)](#)

[William Jolsten, Managing legal talent for resilient growth, Practice Innovations, Thomson Reuters \(Aug. 11, 2021\)](#)

Friday, March 25 – Law Firm Finances: Pricing and Efficiency

[Jean O’Grady, It’s Budget Time! 12 Timely Tips to Help Manage Law Firm Costs, Dewey B. Strategic \(Nov. 19, 2019\)](#)

[Bryce Engelland, Leverage is everything: Archimedean lessons in law firm finances, Thomson Reuters \(Sept. 29, 2021\)](#)

Friday, April 1 – Marketing Part I: Branding

[Greg Lambert & Marlene Gebauer, The Geek in Review Ep. 82 – Law Firm Culture and Marketing, and How to Market Law Firm Culture – Barbara Malin and Jennifer Johnson \(Aug. 13, 2020\) \[Podcast with transcript.\]](#)

[Barbara Kaplin, Lawyers, Is Your Brand Your BFF?, Attorney at Work \(April 1, 2021\)](#)

[Tatia Gordon-Troy, Lawyers, You Write for a Living; Now, Write to Build Your Brand, Attorney at Work \(Feb. 23, 2021\)](#)

[Annette Choti, Lawyers on TikTok: Tips for Short-Form Video Marketing, Attorney at Work \(Nov. 30, 2021\)](#)

Friday, April 8 – Marketing Part II: Communications Strategies and Business Development

[Brad S. Karp and Deborah Farone, Client Development and Care During the Pandemic, as featured in PLI’s “The Chronicle” on September 29, 2020](#)

[Steve Bell and Sylvia L. Coulter, Boosting law firm business development by turning key clients into strategic accounts, Thomson Reuters Forum Magazine \(June 22, 2020\)](#)

[Sally J. Schmidt, Business Development Starters for Law Firm Associates, Attorney at Work \(May 7, 2021\)](#)

[Jennifer Carr, Opportunity in Crisis: Innovative Ways Law Firms Are Stepping Up Client Relationships, Attorney at Work \(April 19, 2021\)](#)

Friday, April 22 – Technology and Cybersecurity

[David C. Donald, The Client Data Windfall Nourishing the Birth of Legal Technologies \(July 23, 2021\)](#)

[Nicole Black, Here are your options for secure real-time chat with your legal team, ABA Journal \(Oct. 26, 2021\)](#)

[Lyle Moran, How one law firm plans to embrace remote work—even after reopening its offices, ABA Journal \(July 8, 2021\)](#)

[David Skinner & Karen Skinner, Remote Work Challenges: What’s Your Biggest Frustration?, Attorney at Work \(Feb. 25, 2021\)](#)

Friday, April 29 – Managing the Client Relationship Part I: Firm Strategies

[Heidi K. Gardner, Collaboration in Law Firms: The new wave of client service, 1 The Practice \(Sept./Oct. 2015\)](#)

[Heidi Gardner and David Harvey, Why Your Firm Needs a Sector-Based Strategy—and How to Build One, LawVision \(Nov. 22, 2019\)](#)

[Steve Bell and Sylvia L. Coulter, Boosting law firm business development by turning key clients into strategic accounts, Thomson Reuters Forum Magazine \(June 22, 2020\)](#)

[Steve Bell and Silvia L. Coulter, Law firm sales and driving revenue in a post-COVID-19 world, Practice Innovations, Thomson Reuters \(May 26, 2020\)](#)

Additional Suggested Resources:

Sylvia L. Coulter and Steven M. Bell, SAM-Legal: Turning Key Clients into Strategic Accounts: A Guide to Law Firm Strategic Account Management, LawVision (2021)

Heidi K. Gardner, Smart Collaboration: How Professionals and Their Firms Succeed by Breaking Down Silos, Harvard Business Review Press (2017)

Friday May 6 – Managing the Client Relationship Part II: The Client’s Perspective

[Cole Silver, Transforming law firm/client relationships, Thomson Reuters Forum Magazine \(Nov. 2, 2021\)](#)

[Silvia Colter, The Client scorecard — How to align & collaborate, Practice Innovations, Thomson Reuters \(Oct. 21, 2021\)](#)

Additional Readings

[Emilio Demetriou-Jones & Fredrik Karlsson, José Eduardo Carneiro Queiroz: 1970 - 2020, Global Banking Regulation Review \(July 24, 2020\)](#)

[Christophe Dubois, How do Lawyers Engineer and Develop LegalTech Projects? A Story of Opportunities, Platforms, Creative Rationalities, and Strategies, 3 Law, Technology and Humans 68-81 \(2021\)](#)

[Deloitte, The Legal Department of the Future: How Disruptive Trends are Creating a New Business Model for In-House Legal \(2017\)](#)

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Faculty Biographical Information

Natalie Alhonte

Natalie Alhonte is the Director of Latam Strategy at Willkie Farr. She is an experienced content and global communications professional, who previously served as a communications professional for a foreign policy think-tank, major multinational corporations, social impact ventures, and international governments. Ms. Alhonte is fluent in English, Spanish, and Portuguese and is a frequent contributor to thought leadership on inclusion, multiculturalism, and culture shock. Prior to her work at Willkie Farr, Ms. Alhonte served as an Immigrant Food Brand Advisor; as Chief Engagement Officer for the Ignite Good Company, where she built a funding platform alongside Arianna Huffington; Associate Director in charge of lead engagements at the Adrienne Arsht Latin America Center team at the Atlantic Council; and led prominent consumer and policy campaigns for the European Union's wine regions.

Stephen Allen

Stephen Allen, Vice President of Get Sh*t Done at Elevate, is dedicated to ensuring that offerings at Elevate solve business-of-law problems that law departments and law firms face now and will confront in the future. Widely recognized as a leading thinker and doer in legal service transformation, before joining Elevate, Mr. Allen directed innovation at Hogan Lovells where he was responsible for data science, legal tech (AI, Machine Learning, Automation), digitalization, legal operations, and disruption. Mr. Allen also architected and implemented the multi-award winning Managed Legal ServiceSM BLP contract for Thames Water, the first-ever multi-year, fixed-price law firm deal for legal services. *Financial Times* awarded Mr. Allen the inaugural Legal Entrepreneur of the Year at its 2019 Innovative Lawyers Awards.

Rafique Bachour

Rafique Bachour is the managing partner of Freshfields. Prior to taking on this role he was global co-head of Freshfields' industrials sector group, which is responsible for clients in the automotive, chemicals, and other industries. Mr. Bachour specializes in antitrust and regulatory aspects of global M&A transactions, international antitrust investigations, and other behavioral and regulatory matters. He has extensive experience managing large-scale transactions that require a global regulatory and merger-control strategy and coordinating multijurisdictional defenses in international investigations and ensuing litigation. He also acts for global financial investors, including sovereign wealth funds and state-owned enterprises, and advises on transactions involving institutional investors. He has unique experience in the Middle East region, where he regularly advises local and international companies on the antitrust and regulatory aspects of their national and international transactions. Mr. Bachour speaks English, Arabic and French.

Donald Baker

Donald Baker is a partner at White & Case and advises clients on a broad range of capital markets offerings, corporate finance transactions and corporate matters. Mr. Baker focuses on the Brazilian

market and wider Latin American region, where he has amassed extensive knowledge and experience over the course of his career. He regularly works with Brazilian companies and financial institutions and also advises international clients interested in investing in Brazil and elsewhere in Latin America. Mr. Baker relocated to São Paulo in 1997 to open the firm's office. He has represented Brazilian and other Latin American issuers in international offerings of debt and equity securities and private placements by an array of Latin American issuers. He is also regularly engaged in cross-border syndicated loans, structured finance and project financing transactions, as well as acquisitions and joint ventures. Mr. Baker is a graduate of the University of Pennsylvania Wharton School of Finance and Commerce and the University of Miami Law School, at which he was elected to Order of the Coif. He speaks English and Portuguese.

Matthew Barlow

Matthew Barlow is the Deputy Chief Information Officer at Latham & Watkins. Mr. Barlow has been a member of the Administrative Leadership team at Latham since 2005, including from 2016 – 2021 when he served as the Director of Security and Infrastructure. Mr. Barlow leads the technology and security teams responsible for the confidentiality, integrity, and availability of the data of the firm and its clients on a global basis.

Prior to his time at Latham & Watkins, Mr. Barlow was a Senior Consultant at Deloitte Consulting LLP. He holds an MBA In Management from Harvard Business School and a B.S. in Communication Studies from Northwestern University.

Maurice Blanco

Maurice Blanco is co-head of Capital Markets at David Polk and a member of the firm's Latin America practice. He is ranked in the top tier for capital markets work by *Chambers Global*. He has worked on public and private debt and equity offerings, exchange offers and debt restructurings by U.S. and non-U.S. issuers in a variety of industries. Mr. Blanco also regularly advises U.S. and non-U.S. corporate clients with respect to general corporate matters, including corporate governance, SEC and Sarbanes-Oxley matters. He divides his time between New York and São Paulo.

Jessica S. Carey

Jessica S. Carey is co-chair of the Paul, Weiss Litigation Department and a member of the firm's Management Committee. She has deep experience handling a wide range of sensitive criminal, regulatory, and complex commercial litigation matters, particularly on behalf of financial institutions. Ms. Carey has helped numerous clients successfully navigate their most significant, threatening white collar matters and internal investigations. In 2021, Ms. Carey was named a *Law360 MVP* for her achievements in the white-collar area. She is also recognized as a leading practitioner by *Legal 500* in the Litigation: Corporate Investigations and White-Collar Criminal Defense category, among other recognitions.

Iván Delgado

Iván Delgado joined Pérez-Llorca in 1999 and was made partner in January 2007. In 2015 he established Pérez-Llorca's New York office and led it for five years. In 2021 he re-joined the Madrid office where he continues to advise on complex transactions and matters, which he combines with his responsibilities in Pérez-Llorca's international practice as head of the LatAm Desk. Mr. Delgado has more than 20 years' experience and specializes in M&A of listed and unlisted companies, venture capital operations, and general corporate and commercial matters. He advises industrial groups such as funds on prominent cross-border transactions in diverse sectors. His focus on advising Latin American clients has provided

him with the opportunity to be involved in some of the most significant transactions in the Spanish market.

Mr. Delgado has been featured in *Chambers Global* and in *Best Lawyers* for his work in corporate, M&A, and private equity law. He was listed in the 40 under Forty list of the Iberian lawyer and received the Universidad Carlos III Premio de Excelencia. He speaks Spanish and English.

Jean Michel Enríquez D.

Jean Michel Enríquez is a partner in the Mexico City office of Creel and a member of the firm's Board of Directors. His practice focuses on M&A, private equity, and capital markets. Among others, Mr. Enríquez regularly advises large multinationals and global private equity investors and sponsors on acquisitions and investments in Mexico across multiple industries. For more than a decade, Mr. Enríquez has been ranked or cited as Band 1, Tier 1 or equivalent in mergers and acquisitions and capital markets by many publications, including: *Chambers Global: The World's Leading Lawyers for Business* from 2003 through 2020, *Chambers Latin America: Latin America's Leading Lawyers for Business* from 2009 through 2020, *The Legal 500* from 2009 through 2019, *IFLR 1000* from 2007 through 2019, *Latin Lawyer 250: Latin America's Leading Business Law Firms* from 2007 through 2019 and is recognized by the Latin American Corporate Counsel Association (LACCA) as one of the region's leading lawyers for 2019. In 2011, Mr. Enríquez was recognized by *Latin Lawyer* as Law Firm Leader of the Year. In 2019, Mr. Enríquez was also recognized as one of the "*Financial Times* Top 10 Legal Innovators for North America."

Mr. Enríquez is a member of the International Bar Association and has been an active Mentor and a Board member of Endeavor Mexico, where he has served as panelist during multiple International Selection Panels (ISP). He is a frequent speaker on M&A and private equity and has been professor of M&A at Universidad Iberoamericana. Mr. Enríquez has written multiple articles and papers on various legal subjects, and has been a faculty member of the Mattos Filho / Fordham University's *Structural Issues in Law Firm Management* Program. Mr. Enríquez worked as Foreign Associate in the New York office of Cravath, Swaine & Moore LLP in 1997 and 1998. He received his law degree from Universidad Iberoamericana in Mexico City and obtained his LL.M. degree from The London School of Economics and Political Science. He is fluent in Spanish, English and French.

Deborah Farone

Deborah Farone is the principal of Farone Advisors. She has unique experience in developing best practices by working with the world's most respected and demanding professionals. Over the past two decades, Ms. Farone has carved out a niche by distinguishing herself as the chief marketing officer of Cravath, Swaine & Moore and Debevoise & Plimpton, and as the founder of both firms' business development and communications departments. Deborah is the author of the best-selling legal marketing book, "*Best Practices: Marketing and Business Development for Law Firms*" (PLI 2019), a work based on more than 60 interviews with successful law firm leaders and marketers, general counsel, and innovators in the profession. Heidi K. Gardner, PhD, Distinguished Fellow, Harvard Law School's Center on the Legal Profession, has called Deborah "the leading expert in law firm marketing. Not only has she studied this complex topic from the peak of the legal profession, her research into what works and what doesn't is priceless for anyone interested in growing their business." Her advisory practice focuses on helping law firms, individual practices and lawyers with their marketing and public relations strategy, training and development and strategic planning. In addition, she is often asked to speak at law firm and legal department partner retreats and workshops in the US, Asia and Europe. Ms. Farone was recently inducted as a Fellow in the College of Law Practice Management. She has also been honored with the Legal Marketing Association's Legacy Award, in recognition of making "a distinguishable mark on the chapter and the profession."

Palmina M. Fava

Palmina M. Fava is a partner in the government investigations and white collar criminal defense practices at Vinson & Elkins. Ms. Fava has more than 20 years of experience representing clients in internal and government investigations, litigation, and corporate governance counseling, with a principal focus on matters involving the Foreign Corrupt Practices Act (FCPA), international anti-corruption, anti-money laundering and anti-bribery laws, accounting irregularities, bid rigging and unfair trade practices, off-label pharmaceutical marketing, misappropriation of trade secrets, fraud, cybersecurity, and data privacy. Among her recognitions, Ms. Fava has been listed in the *Latin Lawyer 250* (2020), *Legal 500* for Dispute Resolution: Corporate Investigations and White Collar Criminal Defense (2020); and *Legal 500 Latin America, Compliance and Investigations* (2021). Prior to joining Vinson & Elkins, Ms. Fava practiced at two other large international law firms. She co-chaired the Global Compliance and Disputes practice, served on the Compensation Committee, and held other leadership roles at her former firms. Ms. Fava is a graduate of Fordham Law School and Georgetown University and is fluent in Italian and proficient in Spanish and Portuguese.

Sergio J. Galvis

Sergio J. Galvis is a partner at Sullivan & Cromwell and a leading corporate lawyer in the United States who is known for his cross-border work, especially in Latin America. He joined Sullivan & Cromwell after graduating from Harvard Law School and clerking for the Honorable Lawrence W. Pierce, Second Circuit U.S. Court of Appeals, and has been a partner of the firm since 1991. He is a member of Sullivan & Cromwell's management committee, oversees the firm's recruiting and administrative functions, and leads its Latin America practice. Mr. Galvis has worked with clients across more than 25 countries in Asia, Europe, and the Americas on hundreds of significant matters in a broad range of practices, including M&A, project financing, capital markets, sovereign financing, workouts and restructurings, corporate governance, crisis management, investigations and disputes. Mr. Galvis is involved with many not-for-profit and foreign policy organizations, including the Council on Foreign Relations and the Council of the Americas, and is a trustee of the University of the Andes Foundation. He was born in Colombia and speaks Spanish and Portuguese. Mr. Galvis is regularly recognized in the areas of M&A, private equity, project development and finance, capital markets, and Latin American investment by *Chambers Global*; *Chambers Latin America*; *Chambers USA*; *Euromoney*; *Financial Times*; *Hispanic Business*; *IFLR1000*; *Law360*; *Lawdragon*; *Latin Lawyer*; *The Legal 500 Latin America*; *The Legal 500 United States*; and *The National Law Journal*.

Joe Green

Joe Green is Director of Client Experience at Gunderson Dettmer. In this role, he leads the firm's efforts to design and implement innovative processes leveraging technology to provide a more valuable, client-centric experience. Mr. Green also is of counsel in the firm's New York office. Mr. Green has extensive experience representing startup and emerging growth technology companies, counseling founders and executives on a wide range of legal and business issues from formation to exit. He also works with the premier venture capital firms and angels that invest in these companies in the United States and internationally. Mr. Green has authored dozens of articles on startup-related issues, the business of law, legal technology and the future of the legal industry. He speaks regularly on these topics at industry and academic conferences, law firms and law schools. Mr. Green's academic work has been cited by SEC commissioners and staff in public speeches and reports on numerous occasions. Mr. Green previously was a senior associate at Gunderson and left to join Thomson Reuters as a Senior Legal Editor at Practical Law, the premier online legal know-how service for business lawyers. At Practical Law, Mr. Green created content and technology solutions enabling thousands of law firm and in-house attorney

customers in the startup and venture capital space to deliver services more efficiently and effectively. Mr. Green started his legal career as a securities lawyer with Simpson Thacher in New York. He received his B.A. (*summa cum laude*) and B.S. (*cum laude*) from the University of Florida and his J.D. from the University of Virginia School of Law.

Eric F. Grossman

Eric F. Grossman is Morgan Stanley's Chief Legal Officer and a member of the Firm's Operating and Management Committees. Prior to joining Morgan Stanley in 2006 as Global Head of Litigation, Mr. Grossman was a partner at Davis Polk & Wardwell. In addition to his position as Global Head of Litigation, he was appointed General Counsel of Global Wealth Management in 2008. In 2010, Mr. Grossman joined Morgan Stanley's Management Committee and was appointed Global Head of Legal. He became Morgan Stanley's Chief Legal Officer with responsibility for the Legal and Compliance Division in January 2012. Mr. Grossman is the President of the Board of Directors of Advocates for Children of New York. He also co-chairs the New York State Business Council for Access to Justice, and is a Vice Chair of the Serve America Movement. He is an Alumni Trustee at Hamilton College, Chair of the Dean's Planning Council at Fordham Law School and a board member of the Fordham Law Alumni Association.

Benjamin Gruenstein

Benjamin Gruenstein is a member of Cravath's Investigations and Regulatory Enforcement practice. His practice focuses on the representation of U.S. and multinational companies and their senior executives in government and internal corporate investigations in such areas as the Foreign Corrupt Practices Act, healthcare fraud, insider trading, criminal antitrust, accounting fraud and trade sanctions, and accompanying civil litigation. Mr. Gruenstein has handled both domestic and cross-border investigations, including in Latin America, Asia, and Europe. He also conducts civil litigation related to government investigations and regularly represents senior executives of companies in criminal and regulatory investigations, including those conducted by the DOJ and the SEC. Prior to joining Cravath, Mr. Gruenstein served as an Assistant U.S. Attorney in the Criminal Division of the U.S. Attorney's Office for the Southern District of New York from 2002 to 2008. Mr. Gruenstein joined Cravath in 2008 and was elected a partner in 2011. He serves as the Litigation Hiring Partner. Mr. Gruenstein is a fellow of the American Bar Foundation. He has been recognized as a "National Star" and as a "Local Litigation Star" in New York for his white collar criminal defense and investigations work by *Benchmark Litigation* (2016-2022). *The Best Lawyers in America* has recognized him for his white collar criminal defense work as well (2016-2022). He has also been recognized by *The Legal 500 US* for his work in white collar criminal defense (2016-2021), general commercial disputes (2019-2020), securities litigation and related regulatory enforcement matters (2015-2017) and for his experience in the media and entertainment industry (2017-2018). From 2013 – 2021, Mr. Gruenstein was selected by *Lawdragon* as one of "500 Leading Lawyers in America." *Chambers USA* recognized him as a leading lawyer in White-Collar Crime & Government Investigations (2019-2021), with a client calling him "the most strategic lawyer I've ever worked with" and a peer describing him as having "impeccable judgement" and "total command of the facts of a case" and as being "outstanding with clients." Together with his colleagues, Mr. Gruenstein earned the Firm a top tier ranking for Criminal Defense: White Collar in the *U.S. News-Best Lawyers "Best Law Firms"* survey. Mr. Gruenstein received an A.B. *summa cum laude* in Philosophy and Mathematics from Harvard College in 1996, where he was elected to Phi Beta Kappa, and a J.D. *magna cum laude* from Harvard Law School in 1999, where he was an Editor of the Law Review. After graduating from law school, Mr. Gruenstein clerked for the Honorable Stephen F. Williams of the U.S. Court of Appeals for the D.C. Circuit and for the Honorable David H. Souter of the U.S. Supreme Court.

James W. Jones

James W. Jones is a Senior Fellow and Director of the Program on Trends in Law Practice at the Center on Ethics and the Legal Profession at the Georgetown University Law Center in Washington, D.C. He is also Principal of Legal Management Resources LLC, a consulting firm providing management and leadership resources for law firms around the world. Mr. Jones is widely recognized as an expert on the U.S. and global legal markets, having spent more than 40 years as a practicing lawyer, a law firm leader, a corporate general counsel, and a management consultant. He frequently works with law firms and their leaders on issues of strategy, governance, compensation, succession planning, and risk management. He is the author of numerous books and articles on legal management topics and is also a frequent speaker on these subjects. From 1986 to 1995, Mr. Jones served as the Managing Partner of Arnold & Porter, which he helped grow from a local Washington, D.C. firm to one with a major national presence. From 1995 to 2000, he was Vice Chairman and General Counsel of APCO Worldwide, a global public affairs and government relations firm, initially started as a subsidiary of Arnold & Porter. From 2001 to 2011, Mr. Jones was Senior Vice President and Managing Director of Hildebrandt International (later Hildebrandt Baker Robbins), a leading management consulting firm to the legal industry that was, through most of this period, part of Thomson Reuters Corporation. He received his Bachelor's Degree *magna cum laude* from Trinity University and his J.D. *cum laude* from New York University School of Law.

Michael Labson

Mr. Labson is a partner at Covington & Burling LLP, where he was a member of the firm's Management Committee and Executive Committee until the end of 2021. He previously served as a Hiring Partner and Co-Chair of the Diversity Committee, and is now Co-Chair of the Firm's Global Life Sciences practice. Mr. Labson is a trusted advisor to pharmaceutical and biotechnology clients for more than 25 years. He draws on his wide range of regulatory expertise to provide strategic and compliance advice, and address FDA and other health care law issues in litigation, investigations, and transactions. Mr. Labson is Band 1 in *Chambers Global* and *Chambers USA* for Pharmaceutical/Medical Products Regulatory and Life Sciences Regulatory/Compliance. He is also recognized in *The Best Lawyers in America*, *Washington DC Super Lawyers*, and *LMG Life Sciences*, where he was the Life Sciences Attorney of the Year in 2016. His pro bono work focuses on criminal justice matters. He is on the Board of the Children's Law Center and previously served as the Vice Chair of the Children's Dental Health Project. Mr. Labson has also been an Adjunct Professor of Law at the American University Washington College of Law and is a Fellow of the American Bar Foundation.

Sascha Leske

Sascha Leske is a partner and is head of the New York Office of Noerr. Mr. Leske provides legal and tax advice to clients in major M&A transactions, private equity investments, portfolio reviews and reorganisations. While his primary areas of focus include the fields of new technology, media and telecommunications, Mr. Leske is also experienced in matters involving manufacturing, infrastructure, retail and consumer goods and services. As head of Noerr's New York office, he is a specialist in cross-border matters and regularly takes the lead in multinational projects, coordinating advice across several jurisdictions, including those involving developing and emerging markets. As a recognized leader in the industry, Mr. Leske is a frequent speaker on the topics associated with international business and legal matters.

Barbara Levi

Barbara Levi is a member of the Group Executive Board and the Group General Counsel of UBS Group AG and UBS AG. Based in Zurich she is leading UBS's legal teams around the world. Ms. Levi has extensive experience across corporate, commercial and compliance matters. For over 20 years, she has held a number of senior legal and compliance roles across Europe and in the US, in-house and in private practice. Before joining UBS, Ms. Levi was Chief Legal Officer & External Affairs at Rio Tinto and has worked for 15 years at Novartis in different senior roles such as Group Legal Head M&A and Strategic Transactions, General Counsel of Sandoz, the generic arm of Novartis, Global Legal Head Product Strategy & Commercialization, General Counsel for Asia-Pacific, Middle East and Africa, and Global Legal Head for Technical Operations for the Pharma division of Novartis. In addition, Ms. Levi led cross-divisional practice teams, building capabilities and establishing standards and processes for compliance with trade sanctions and anti-bribery. Before joining Novartis, Ms. Levi has worked as a litigator in law firms in Milan (Italy) and as corporate and transactional attorney in law firms in New York City (US) for several years. Ms. Levi is an attorney-at-law, admitted to the U.S. Supreme Court, the New York Bar, and the Italian Bar.

David Lucking

David Lucking is the Global Head of the International Capital Markets group at Allen & Overy. He has particular expertise in derivatives and structured finance transactions, as well as the regulatory framework that underpins the derivatives market. Mr. Lucking advises financial institutions on a wide range of derivatives products and assets in both funded and unfunded form. As Co-Head of A&Out, the firm's international LGBTQ+ allies program, Mr. Lucking is a vocal advocate for the LGBTQ+ community at A&O. He regularly leads initiatives to encourage workplace diversity and helps foster a culture where LGBTQ+ colleagues feel welcome and valued. Mr. Lucking is regularly ranked in legal directories.

Margaret H. Nicholls

Margaret H. Nicholls is the Global Director of Practice Management and Marketing at Debevoise & Plimpton LLP where she guides and executes the firm's client development, practice, and industry group management, and marketing and communications initiatives. Ms. Nicholls oversees a team of practice managers, who are business specialists embedded in practice and industry groups, as well as a large global team of marketing, communications and research professionals. Before joining Debevoise, Ms. Nicholls served as a Director of Business Development at Simpson Thacher & Bartlett LLP and prior to that, practiced as a capital markets attorney at also at Simpson Thacher. Earlier in her career, Ms. Nicholls was a management consultant with both Booz Allen Hamilton and PwC Consulting. She received her J.D. from Georgetown University Law Center and her B.S. in Economics, cum laude, from the Wharton School at the University of Pennsylvania.

Francesca L. Odell

Francesca L. Odell is a partner at Cleary Gottlieb where she assists both international and U.S. clients on a range of capital markets and corporate governance matters. She is one of the foremost capital markets lawyers for Latin American and Brazilian international issues, and her clients include many of the region's largest companies in the oil and gas and telecommunications sectors.

Ms. Odell's cross-border practice focuses on capital markets, corporate governance, M&A, private equity, project finance, and restructuring transactions, and she is known for delivering practical, business-savvy solutions to complex and high-profile issues. In addition to her transactional practice, she regularly advises boards of directors and management on a variety of topics, including disclosure and compliance matters; stock exchange listing requirements; board composition and director

independence; shareholder engagement and activism; shareholder proposals and proxy season trends; management and director succession planning; and environmental, social and governance (ESG) issues.

She is recognized as a Leading Capital Markets and Corporate/M&A Lawyer by *Chambers Global*, *Chambers Latin America*, *The Legal 500 Latin America* and *Latin Lawyer 250* and as a leading lawyer for Latin American Investment by *Chambers USA*. Ms. Odell has served in a number of leadership roles at Cleary Gottlieb, including as a member of the firm's Executive and Leadership Development Committees, the inaugural chair of the firm's Committee on Retention & Promotion of Women and co-chair of the firm's Foreign Lawyer Program.

Evette Pastoriza Clift

Evette Pastoriza Clift oversees Clifford Chance's Global Information Technology Services teams. Since 2008, Ms. Pastoriza Clift has driven the Firm's strategic priorities through the implementation of technology solutions and processes that support and improve the delivery of legal services across 34 offices in 23 countries.

With 20+ years of industry experience, Ms. Pastoriza Clift manages a team of more than 275 professionals with a focus on IT transformation and the realignment of business models and technology initiatives to drive exponential value through continuous reinvention. She leads the use of outsourcing services and has a strong understanding of how powerful results can be achieved through strategically orchestrated solutions.

Ms. Pastoriza Clift graduated from the City University of New York with a degree in Accounting & Information Systems. Earlier in her career she worked in Finance and Publishing. Prior to joining Clifford Chance, Ms. Pastoriza Clift was the head of operations for a premier Legal Technology consulting group.

Pedro Pérez-Llorca

Pedro Pérez-Llorca is the Senior Partner of Pérez-Llorca. He has more than 25 years' experience as a corporate lawyer in the Spanish market. He focuses on public and private M&A for strategic clients and financial sponsors. Over the last few decades Mr. Pérez-Llorca has been involved in the most significant transactions in Spain and those with a Spanish component, including the largest public takeover, the largest crossborder merger, and the largest privatization and IPO in Spain. He has played a major role in the growth of the firm, particularly within its corporate practice.

Mr. Pérez-Llorca has been featured in various legal directories such as *Chambers Global: Corporate/M&A (Band 1)*-, and has received numerous awards, including *Best Lawyers®* Investment Funds "Lawyer of the Year" (2020) in Madrid and Private Equity Law "Lawyer of the Year" (2019) in Madrid. He speaks Spanish and English, and he also reads French, German and Italian.

Antonio N. Piccirillo

Antonio N. Piccirillo is the head of the São Paulo office of Proskauer and a member of the Latin America Practice Group. Antonio's practice focuses principally on transactional and finance matters in Latin America. He has extensive experience in bank finance, securities law and corporate governance (including Sarbanes-Oxley compliance), capital markets, project finance, debt restructurings (including tender offers, consent solicitations and exchange offers), securitizations and mergers & acquisitions. While serving on the *Fordham International Law Journal*, Antonio authored "The Metamorphosis: Expected Changes in The Brazilian Debt-for-Nature Swap Process and Policy Implications," and co-

authored “A Citation Manual for European Community Materials.” In 2008, he authored a chapter titled, “Bridging the Gap – Recent SEC Initiatives to Ease Burdens on Foreign Private Issuers,” in *International Business Transactions with Brazil*.

Amadeu C. Ribeiro

Amadeu C. Ribeiro is the partner in charge of the New York office of Mattos Filho, a full-service Brazilian law firm. Mr. Ribeiro advises clients on complex antitrust matters. His expertise includes merger review cases, cartel investigations, and general antitrust counseling. He is the Vice-President of the Brazilian-American Chamber of Commerce and a member of the International Task Force of the American Bar Association – Antitrust Law Section. Mr. Ribeiro is recognized as a leading antitrust lawyer by publications such as *Chambers and Partners*, *Global Competition Review*, *Latin Lawyer*, *Who’s Who Legal*, and *Legal 500*. At the age of 40, *Global Competition Review* elected him one of the top 40 antitrust lawyers in the world. Mr. Ribeiro received a law degree in 1996 and a doctorate degree in 2004 from the Law School of the University of São Paulo. He also received an LL.M. degree (*cum laude*, Michael Treanor Award) from Fordham Law School in 2017. Mr. Ribeiro has published a book and several articles on antitrust law. He is a member of the adjunct faculty at Fordham Law School. He speaks English, German and Portuguese.

Fiona A. Schaeffer

Fiona A. Schaeffer is a partner in the New York office of Milbank where her practice focuses on international antitrust law. She handles “bet-the-company” criminal and civil cases as well as complex transactions. She counsels clients in a variety of industries, with a particular depth of experience in healthcare, financial services, energy, media and communications. Ms. Schaeffer regularly represents clients in FTC and DOJ investigations and class actions in the US and internationally. She also counsels clients on optimizing intellectual property rights and licensing, distribution, and marketing practices. Ms. Schaeffer began her legal career in the UK and has appeared before courts and regulators throughout the EU as well as other significant antitrust enforcement agencies around the world. Ms. Schaeffer is the Vice Chair of the American Bar Association’s Section of Antitrust Law, former Chair of the Antitrust & Trade Regulation Committee of the New York City Bar Association and member of the Executive Committee of the New York State Bar Association Antitrust Section. She is consistently recognized as a leading antitrust lawyer by *Chambers*, *The Legal 500*, *Global Competition Review* and *Benchmark Litigation*, among others. Ms. Schaeffer holds law and economics degrees from the University of Adelaide and a masters in law from the University of Oxford.

Scott V. Simpson

Scott V. Simpson is the co-head of Skadden’s Global Transactions Practice and a member of the firm’s Policy Committee. He has been based in London since 1990 and practiced law in Skadden’s New York office throughout the 1980s. Mr. Simpson advises clients on cross-border M&A, including contested and hostile bids. He also has significant experience advising a variety of public companies on complex corporate governance issues. Mr. Simpson lectures and participates in seminars on topics related to his practice, including those sponsored by the Practising Law Institute and the American Bar Association. He is an adjunct professor at Ohio State University’s Moritz School of Law and Fordham Law School and is a regular guest lecturer at Harvard Law School and the Luxembourg University. He also has written and co-authored articles for, among other publications, *The Business Lawyer*. Mr. Simpson’s transactional experience has been profiled in *The American Lawyer*, *Financial Times*, *The Evening Standard*, and *The Wall Street Journal*. He also was named Transatlantic Law Firm Leader of the Year at the Transatlantic Legal Awards in 2018. Mr. Simpson consistently is ranked among the top transaction lawyers in Europe according to merger-market data on the value of European M&A deals. He is one of the world’s leading

M&A lawyers, according to the *Chambers & Partners* guides in the U.K., Europe and globally. He also was named in *The Legal 500's* U.K. Hall of Fame in 2018, as a Market Leader for M&A in *IFLR1000* 2020 and recognized in *Best Lawyers in the UK* 2021 for M&A. Mr. Simpson holds a B.A. from George Washington University, an M.B.A. from NYU Graduate School of Business Administration, and a J.D. from Fordham Law School.

Pablo Sorj

Pablo Sorj is a partner at Mattos Filho and represents companies, sponsors, investment funds and financial institutions in a wide variety of transactions in the infrastructure and energy sectors. He advises on asset sales and purchases, structured finance, acquisition finance and project finance. He has previously worked as a foreign lawyer at Gibson, Dunn & Crutcher LLP in New York. Currently, he is also co-chair of the Stanford Law School Alumni Association in Brazil and Sector Vice President of the Brazilian Center for Mediation and Arbitration (CBMA). He is consistently recognized as a leading Projects lawyer by Chambers (Band #1), IFLR (Market Leader), The Legal 500 (Leading Lawyer), among others. Mr. Sorj holds a law degree from PUC-RJ, an executive M&A from IBMEC-RJ and an LLM from Stanford Law School.

David J. Wolfson

David J. Wolfson is the Executive Director of Milbank and a partner in the firm's corporate group. As Executive Director, Mr. Wolfson works with the Chairman and the firm's Executive Committee to manage the firm globally. He joined Milbank in 1993 and has been a partner since 2003. Mr. Wolfson focuses mainly on the representation of domestic and international companies in connection with a wide variety of business matters, including mergers and acquisitions, private equity and venture capital investments, joint ventures, and corporate restructurings, including bankruptcy-related restructurings. He has significant cross-border M&A experience. Mr. Wolfson has received the 2013 *International Law Office (ILO) Client Choice Award* for M&A in New York and for the USA overall. Mr. Wolfson has been recognized in *The Legal 500 United States* and *The Legal 500 Latin America* for his M&A work. Mr. Wolfson is currently an adjunct professor at NYU School of Law. He is also the chair of the firm's Professional Development Committee. He is a graduate of Columbia School of Law where he was a Harlan Fiske Stone Scholar, and Duke University.