



## Michael G. Schwartz

PARTNER

### Cincinnati

301 East Fourth Street  
Suite 3500  
Great American Tower  
Cincinnati, Ohio 45202

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### Practice Areas

Federal Taxation

Taxation

Trusts, Estates and Wealth  
Transfer

### Education

University of Florida Fredric G.  
Levin College of Law, LL.M., 1992

University of Cincinnati College of  
Law, J.D., 1991

University of Pennsylvania,  
Wharton School of Business, B.S.,  
1988

### Bar & Court Admissions

Ohio

*Admitted to practice law only in  
the states listed above.*

### Industries

Family Offices

Health Care

Mike is a partner in the Vorys Cincinnati office. He represents many high net-worth individuals with respect to their estate planning needs; corporate fiduciaries and beneficiaries with respect to trust administration and dispute resolution; and closely held businesses with respect to all facets of business planning. Mike brings a practical approach to the law and has the unique ability to make complicated areas and issues understandable.

### Career highlights include:

- Being one of only four attorneys in Ohio certified as a dual specialist by the Ohio State Bar Association in the practice areas of Federal Taxation Law and Estate Planning, Trust and Probate Law
- Representing numerous high net-worth families and individuals in connection with single and multi-generation estate and tax planning
- Successfully resolving many large trust administration and related controversies on behalf of trustees and beneficiaries
- Serving as outsourced general counsel to several closely held businesses in a variety of service and manufacturing industries, overseeing numerous acquisitions, divestitures, restructurings and day-to-day legal assistance
- Led large Inherited IRA Review Project for national bank involving the review of over 130 trusts in 20 jurisdictions to determine qualification for stretch-out and proper allocation of distributions between income and principal

Mike is a member of the Ohio State Bar Association, the Cincinnati Bar Association and the Cincinnati Estate Planning Council.

Mike is a frequent speaker on advanced estate and business planning topics at professional education seminars, including the Southwest Ohio Tax Institute, the Advanced Estate Planning Institute and the Midsouth Estate Planning Conference.

Manufacturing

Restaurants, Food and Beverage

Tax-Exempt Organizations

Mike received his LL.M., Taxation from the University of Florida Fredric G. Levin College of Law, his J.D. from the University of Cincinnati College of Law and his B.S. in Economics from the University of Pennsylvania, Wharton School of Business.

## Events

4.24.2017

2017 Fifth Third Trust Officer & Portfolio Manager Conference

4.21.2017

2017 Ohio Meeting of the American College of Trust and Estate Counsel

4.30.2013

Best Ideas 2013

2.10.2012

Advanced Estate Planning Institute

4.25.2009

2009 American College of Trust and Estate Counsel Ohio Seminar