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USA: Iowa

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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.

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PRIVATE WEALTH LAW Iowa

Private Wealth Law
Iowa
Leading Firms
Band 1
Belin McCormick PC
Bradshaw, Fowler, Proctor & Fairgrave, PC
Brown, Winick, Graves, Gross, Baskerville
Simmons Perrine Moyer Bergman PLC
Band 2
Davis, Brown, Koehn, Shors & Roberts, PC
Leading Individuals
Band 1
Carey Paul <i>Brown, Winick, Graves, Gross, Baskerville</i>
Kerkove Janice <i>Bradley & Riley PC (ORL)</i> ◇
Long Christine <i>Bradshaw, Fowler, Proctor & Fairgrave</i>
Morf Paul <i>Simmons Perrine Moyer Bergman PLC</i>
Reames Wayne E <i>Belin McCormick PC</i>
Sanders Doyle <i>Bradshaw, Fowler, Proctor & Fairgrave</i>
Streit Gary J <i>Shuttleworth & Ingersoll PLC (ORL)</i> ◇
Zumbach Steven E <i>Belin McCormick PC</i>
Band 2
Bogguss Scott <i>Simmons Perrine Moyer Bergman PLC</i>
Houser Thomas <i>Davis, Brown, Koehn, Shors</i>
Repp David <i>Dickinson, Mackaman, Tyler (ORL)</i> ◇
Van Houten Margaret <i>Davis, Brown, Koehn, Shors</i>
Up-and-coming individuals
Hodges Robert <i>Brown, Winick, Graves, Gross</i>
◇ (ORL) = Other Ranked Lawyer.
<i>Alphabetical within each band. Band 1 is highest.</i>

Band 1

Belin McCormick PC

Belin McCormick provides assistance with estate and tax planning matters, and also handles trust administration. “They are perhaps the most prominent estate planning office in Iowa,” says a source, adding: “They are very knowledgeable regarding the tax laws and inheritance tax laws. They look at the nuances and relationships between the families.”

One market commentator states: “They are fantastic. They are very savvy in the techniques they recommend and implement, and they have great bedside manner.” Another agrees that the firm is “very, very strong all the way around.”

Notable practitioners

Wayne Reames has extensive experience advising wealthy clients on estate planning and business succession matters. “He has broad, expansive knowledge and a strong and capable understanding of inheritance tax laws,” according to one source. Another notes: “He is very, very sound technically, he has great advice and insight about what is going on in the market.” Reames is also praised for his “strong analytical skills and incredible in-depth knowledge of the law.”

Steven Zumbach is an experienced trusts and estates practitioner. “He is a very educated attorney,” observes a source, who adds: “He has a PhD in economics, a strong agriculture background, he is politically astute and is receptive in handling families’ affairs. He is very involved in the state of Iowa and his network is expansive.” One interviewee states that he is a “brilliant guy, and easy to work with,” and another says that “his depth of experience in dealing with large and small businesses is invaluable.”

Bradshaw, Fowler, Proctor & Fairgrave, PC

Bradshaw Fowler’s lawyers counsel clients on the administration of trusts and estates, charitable giving and retirement planning, as well as business succession planning. Members of the team also represent clients in probate and estate litigation matters.

One Iowa source says: “They are a very fine firm with good lawyers, and have done a good job for many years.”

Notable practitioners

The “pre-eminent” **Christine Long** has an excellent reputation among her peers for her estate planning expertise. “She is a superstar,” enthuses one source, who reports that Long “has a command of the trust and probate code,” describes her as “an extremely hard worker” who is “diligent and cerebral,” and adds that “she has a lock on the market and brings all the tools to the table.” Another interviewee states: “She is a technically strong lawyer, she understands personalities and profiles of people and crafts an appropriate solution.”

Doyle Sanders is “a very good lawyer” who has “been around for a long time and has good common sense about how he goes about his practice,” states a source. Sanders concentrates his practice on estate planning and probate issues. One commentator says: “Doyle is very detail-oriented in his approach. He is well known and very involved in the State Bar probate section.”

Brown, Winick, Graves, Gross, Baskerville and Schoenebaum PLC

A client says Brown Winick is a “very capable firm that is attentive to our needs and provides good, common-sense solutions that are fact-specific as opposed to a ‘one size fits all’ approach.” The firm is recognised for its well-established wills, estate and probate law practice.

“They have a long history with our clients and use that knowledge to provide effective advice,” says one source. Another reports that “they have depth of attorneys – their partners and associates complement each other well. It is an excellent law firm and they hire quality staff.”

Notable practitioners

Paul Carey assists wealthy clients with estate planning and business succession matters. “Paul is very well versed in all such issues and provides in-depth analysis to resolve tax issues for high net worth clients,” reports one source, who adds that “his analysis and work product is excellent.”

Robert Hodges is “very competent and knowledgeable on estate planning matters including individuals with a higher net worth,” reports a source. Hodges leads the firm’s wills, estate and probate law group and advises clients on estate planning and taxation issues. “He is willing to meet the client where they are, he is engaging and responsive to enquiries,” comments an interviewee, adding: “He is very knowledgeable, he reads the room really well and responds appropriately.”

Simmons Perrine Moyer Bergman PLC

Simmons Perrine Moyer Bergman has a well-regarded wills, trusts, estate planning and probate law team that assists high net worth individuals and families across Iowa on the full range of estate planning matters.

Local sources describe it as a “*very well-known and well-regarded*” firm, and one interviewee comments that “*they have a lot of smart lawyers and are very competent.*”

Notable practitioners

The “*top-notch*” **Paul Morf** is “*one of the leading attorneys in eastern Iowa in estates law,*” states one market insider. Interviewees say he is a “*superstar,*” who is “*in a class of his own intellectually – he practises law at the highest level.*” Morf advises on a broad range of estate planning issues, including charitable planning and trust litigation.

Scott Bogguss is “*one of the top attorneys in trust and estates in Iowa,*” says an interviewee who describes Bogguss as a “*nice, unassuming, mellow, practical attorney,*” and states: “*I would feel comfortable referring any member of my family to him.*” Bogguss is a trusted adviser to wealthy business owners and their families, assisting with all matters related to estate and succession planning.

Band 2**Davis, Brown, Koehn, Shors & Roberts, PC**

Davis Brown has a well-respected wills, trust and probate group based in Iowa. The team is experienced in working with closely held business and high net worth individuals on a wide range of estate planning matters.

“*The firm is very well organised and welcoming,*” says one client source, and another interviewee reports that “*they have several really strong people there.*”

Notable practitioners

Thomas Houser counsels high net worth clients on estate planning, business succession, taxation and the administration of probates. Sources report that “*he is very practical and has a good client base.*” One market commentator praises Houser for his “*good technical knowledge and practical approach to the issues,*” adding that “*he is very effective with his clients.*”

Margaret Van Houten advises clients on estate planning and tax matters. “*She is very good, she is very smart and known in the community,*” reports one source. Interviewees also praise Van Houten for her “*great skill and knowledge base.*”

Other Ranked Lawyers

Janice Kerkove of Bradley & Riley PC advises wealthy families and individuals on tax and estate planning matters. “*She is very good and does a great deal of work in this area,*” says a source, who continues: “*She is very smart, very pragmatic and has a good grasp of the technical area.*”

David Repp of Dickinson, Mackaman, Tyler & Hagen, PC enjoys a strong reputation among his peers in Iowa. “*He is very good,*” describes one source, who adds: “*He has strong technical knowledge and equally strong knowledge in partnership and income tax. He has a broader-base skill set than most lawyers and is a great communicator with in-depth knowledge.*”

Gary Streit of Shuttleworth & Ingersoll PLC is described by one of his peers as a “*super guy*” who is “*very intelligent but very humble.*” He counsels wealthy individuals and business owners on tax and estate planning and business successions. “*He exercises good judgement and has a commonsensical approach,*” notes a source, adding: “*He has that problem-solving ability to come up with creative solutions.*”

ACCOUNTANTS & TAX ADVISERS Iowa**Accountants & Tax Advisers****Leading Firms**

Eide Bailly LLP

RSM US LLP

Eide Bailly LLP

Eide Bailly assists clients with tax, estate and transition planning, and can also provide investment management and charitable planning advice through its specialist wealth management team.

Eide Bailly acquired the Des Moines firm Roth & Co in 2017. One Des Moines source notes that “*the local office is really good – they bought some very good accountants who have stayed there.*” Another market source adds: “*They are good people who approach things from a reasonable perspective. They are just good tax people.*”

RSM US LLP

RSM is noted by commentators as “*the largest accounting firm in Iowa,*” which has “*more accountants here than any other firm.*” It provides tax and wealth planning services for HNW clients. “*They have got a good depth and breadth of practice,*” reports an interviewee.

The firm regularly works for wealthy individuals, family offices, business owners and company executives. “*They are fantastic,*” enthuses a source, who explains: “*They attract the crème de la crème and they adopt a team approach.*”

Key contacts:

Chad Tramp, Partner
Travis Fell, Partner

WEALTH MANAGERS Iowa

Wealth Managers
Leading Firms
Bankers Trust
Foster Group

Bankers Trust

Bankers Trust helps affluent individuals and their families with financial planning and investment management. *"They do a nice job,"* says a source, who adds: *"They have a more traditional conservative approach to planning and they have longevity on their staff, which is great hallmark of any company."*

The bank also provides fiduciary services and has a dedicated trust company, BTC Trust Company of South Dakota. One source says: *"Their biggest strength is that they have a South Dakota presence."*

Key contact:

Brian Blankenburg, Private Client Wealth Adviser

Foster Group

Hailed as *"one of the top firms in town"* by a Des Moines source, Foster Group is a trusted adviser to wealthy individuals in Iowa. *"They are holistic and play well with other advisers,"* says one interviewee; *"they have got good tools, a good bench and provide a customer-tailored service."* Another describes the firm as *"fantastic"* and adds that *"they are top-notch with client service."*

The team at Foster Group offers wealthy clients guidance on investment management and financial planning. *"They bring an element to the table that few other planners can, which is that they are big on technology,"* observes a commentator, adding: *"They do it the right way. They are wonderful."*

Key contact:

Phil Kruzan, Lead Adviser