

PEOPLE



Thomas R.
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Partner

Contact

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Focuses his practice on asset-backed securities and corporate finance with an emphasis on specialty finance and insurance and risk-linked securities.

Tom has extensive experience in life settlements, specialty finance, premium finance, longevity and pension risk transfer, alternative risk transfer, litigation finance and other non-bank finance products.

He advises clients on the formation of domestic and offshore funds that invest in the life settlement and premium finance asset classes.

Tom lectures on matters relating to the mortality and longevity markets, and he writes on topics involving life settlements and securities as well as the financial aspects of alternative energy and climate change disclosures.

Practices

BLOCKCHAIN TECHNOLOGY AND DIGITAL ASSETS

FINANCE

LITIGATION FINANCE

PRIVATE CREDIT

STRUCTURED FINANCE

Bar Admissions

New York

Education

Columbia Law School, J.D.

- Harlan Fiske Stone Scholar
- Note Editor, *Columbia Journal of Environmental Law*

Yeshiva University, B.S.

- *magna cum laude*

Publications

- “Private Funds – Market Trends Report,” *Schulte Publication*, June 2021
- “Private Funds – Market Trends Report,” *Schulte Publication*, October 2020
- “Private Funds – Market Trends Report,” *Schulte Publication*, May 13, 2020
- “IRS Discussing Tax Reporting Rules on Transactions With Trade Groups,” *The Deal*, February 2018 (quoted)
- “Marketplace Lending and the Dangers of Disruption,” *Alt Credit Intelligence*, June 2016 (quoted)
- “Madden Versus Midland Funding: Where Are We Now?” *Alt Credit Intelligence*, June 2016
- “Life Settlements and Longevity Swaps: Opportunities for Investors, Individuals, Insurers and Pension Funds,” *The Hedge Fund Journal*, April/May 2016, co-author
- “The New Banks – Alternative Lending: With Schulte’s Leading Structured Finance Lawyers,” *The Hedge Fund Journal*, April/May 2016
- “Marketplace Lending Investments: A Primer for Investment Managers,” *The Hedge Fund Journal*, March 2016, co-author
- “The Current Round of COI Increases: Lessons from the Past,” *Fasano Newsletter*, January 2016
- “Life Settlement Securitization,” *Securitizations: Legal and Regulatory Issues*, ALM Law Journal Press, 2015, co-author

Speaking Engagements

- “Beyond Price Dawe: The Current State of Life Settlement Litigation,” ILMA 13th Annual Investor Summit, December 2022
- “Emerging Considerations for Off-Shore Fund Advisors,” LISA 10th Annual Life Settlement Institutional Investors Conference, New York, February 2020
- “A Practical Guide to Tax Reporting,” ILMA Roundtable 2019, New York, December 2019
- DealFlow Events Life Settlements Conference 2018, New York, September 2018
- “An Update on STOLI and COI Litigation,” ILMA 10th Annual Investor Summit, New York, April 2018
- “Federal Tax Provision Changes,” LISA 8th Annual Life Settlement Institutional Investors Conference, New York, February 2018
- “Smart Contracts,” Schulte 27th Annual Private Investment Funds Seminar, New York, January 2018
- “Legal and Operational Aspects of Potential Blockchain Applications in the Derivatives Markets,” Managed Funds Association OTC Derivatives Forum, New York, November 2017
- “Recent Trends in Litigation: What Investors Need to Know,” LISA 23rd Annual Fall Life Settlement and Compliance Conference, New York, October 2017
- “Getting Prepared as a First Time Securitization Issuer,” Opal Financial Group Marketplace Lending & Alternative Financing Summit, Dana Point, Calif., December 2016
- “If You Can’t Beat ‘Em, Join ‘Em: Bank Collaboration and the Emergence of Composite Lending,” IMN 2nd Annual Investors’ Conference on Marketplace Lending, New York, December 2016
- “Legal and Regulatory Update – US & Europe,” BVZL & ELSA Life Settlement Investor Conference, Munich, September 2016

- “A Legal and Legislative Update,” ILMA 8th Annual Investor Summit, New York, June 2016
 - “Hot or Not: The Securitization of Marketplace Loans,” Schulte Marketplace Lending for Investors: Navigating the Alternative Finance Market Webinar, May 2016
 - “Opportunities and Challenges for Private Investment Funds,” Schulte Marketplace Lending Webinar, March 2016
 - “Understanding the Current COI Increases: The Legal Perspective,” ILMA Investor Roundtable, New York, December 2015
 - “Regulatory – Legal Update,” Fasano Associates 12th Annual Life Settlement & Longevity Conference, Washington, DC, October 2015
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Prior Experience

- Stroock & Stroock & Lavan
- McDermott Will & Emery