



David Lifshitz
Special Counsel

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Counsels private investment fund managers with respect to a broad range of fund formation and regulatory and compliance matters, typically serving as the day-to-day primary client contact with respect to such matters.

David's fund formation experience includes advising managers of single-strategy hedge funds, multi-manager funds, private equity funds, hybrid funds and other pooled investment vehicles in connection with their structuring, formation, investor negotiations and ongoing operational needs, including with respect to drafting and negotiating the full suite of organizational and offering documents, side letters, and service provider agreements.

His regulatory and compliance experience includes advising all types of fund managers in the review of their marketing and investor reporting collateral for compliance with SEC marketing rules, as well as preparing

and updating Form ADVs, Form PFs, Section 13 and Section 16 filings, compliance manuals and responses to FOIA requests.

Practices

INVESTMENT MANAGEMENT

HEDGE FUNDS

PRIVATE EQUITY

Bar Admissions

New York

New Jersey

Education

University of Pennsylvania, The Wharton School, Certificate in Management

University of Pennsylvania Law School, J.D.,

- Associate Editor, *Journal of Business Law*

Excelsior College, B.S.

Prior Experience

- Lowenstein Sandler