



Michael G. Schwartz

PARTNER

Cincinnati

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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.

Honors & Recognitions

Miriam Dettlebach Volunteer of the Year Award, Jewish Family Service of Greater Cincinnati, 2014

American College of Trust and Estate Counsel (ACTEC), Fellow, 2008–present

Chambers & Partners, *High Net Worth Guide*, Leading Lawyer in Private Wealth, 2022–2025

The Best Lawyers in America, Tax Law "Lawyer of the Year," 2012

The Best Lawyers in America, Commercial Litigation, 2015, 2017–2026; Tax Law, 2007–2026; Trusts and Estates, 2007–2026

Ohio Super Lawyers, Estate Planning & Probate, 2013–2022, 2024–2026; Closely Held Business, 2004–2006, 2009

Martindale-Hubbell AV Peer Review Rated

Professional and Community Activities

American College of Trust and Estate Counsel (ACTEC) Fellow, Fiduciary Litigation Committee Member; Asset Protection Committee, Past Member

Cincinnati Estate Planning Council, Past President and Board Member.

Jewish Family Service of Greater Cincinnati, Past President and Board Member

Cincinnati Bar Association, Past Board Member

Ohio State Bar Association Estate Planning, Trust and Probate Law Specialization Board Member

Wharton Club of Cincinnati, Past President

Financial Planning Association of Greater Cincinnati, Past President