

Chambers

High Net Worth
2021

The leading HNW
professionals worldwide

USA Hawaii



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

Private Wealth Law
Hawaii
Leading Firms
Band 1
Cades Schutte LLP
Goodsill Anderson Quinn & Stifel LLP
Band 2
Carlsmith Ball LLP
Starn O'Toole Marcus & Fisher
Leading Individuals
Band 1
Griswold Rhonda Cades Schutte LLP
Lee Judy Yuriko Goodsill Anderson Quinn & Stifel
Okada Ray Goodsill Anderson Quinn & Stifel LLP
Smith Douglas C. Damon Key Leong A (ORL) ◇
Taylor Carroll S Taylor, Leong & Chee (ORL) ◇
Band 2
Brown Trevor A. Starn O'Toole Marcus & Fisher
Grimes Joanne Lo Carlsmith Ball LLP
Makuakane Scott Est8Planning Counsel (ORL) ◇
Miyasaki Joy Carlsmith Ball LLP
Oda Harry Carlsmith Ball LLP
Young Eric S.T The Law Offices of Eric S.T. (ORL) ◇
Up-and-coming individuals
Shelverton Summer Cades Schutte LLP
Vermillion Daniel C. Cades Schutte LLP
◇ (ORL) = Other Ranked Lawyer.
Alphabetical within each band. Band 1 is highest.

Another commentator says: "This law firm has to be one of the best in Hawaii for problem solving and good advice in personal and corporate matters."

Notable practitioners

Rhonda Griswold is "professional, warm, easy to talk to and able to communicate complex trust issues in an understanding way," states an interviewee, adding: "She is known throughout the community and by other high wealth families as one of the best in the city."

Another source describes Griswold as "easy to work with" and says that she "gets concepts and ideas and legal issues conveyed to non-lawyers very well." Her work includes advising wealthy clients on estate and business succession planning, but she is also an acknowledged expert on contentious trusts and estates matters.

Summer Shelverton is "an up-and-coming top trust and estate attorney in Hawaii," according to a market commentator. She advises on trust and estate planning and administration and related disputes. She also assists international clients interested in investing in the USA. "Summer is very good. All of my interactions with her have been very positive," says an interviewee, who also describes her as "very professional and responsive."

Daniel Vermillion handles trust and estate planning, and is particularly well known among interviewees for his client-handling skills. "Dan is extremely knowledgeable and professional, but is also very personable," observes a source, adding: "Dan does a great job translating complex legal, financial and tax concepts for the layman such that clients feel well informed and in control of relevant estate and tax planning processes." Another says: "I have worked with many lawyers over the years and I can honestly say Dan has been the easiest and most enjoyable to work with. He has a relaxed style that immediately puts you at ease. He makes everything seem simple and guides you through a process one step at a time."

Goodsill Anderson Quinn & Stifel LLP

Goodsill Anderson Quinn & Stifel has an excellent reputation for guiding wealthy individuals and families through complex trust and estate planning matters.

"They have a high reputation in the community," says a local attorney, adding: "Besides their client work, they do civic and community work; they are active in the estate and trust area of the Bar in terms of continuing legal education."

Notable practitioners

Judy Yuriko Lee assists clients with trust and estate planning and administration matters. "I think Judy is well versed in all sorts of estate and tax matters. She's a really nice person and easy to deal with," says a fellow attorney, who adds: "She is definitely very smart and knows her stuff."

Ray Okada is "as good as anybody in this practice," says a US-based attorney. His work includes estate and trust planning and administration, but Okada is particularly well known for his expertise in fiduciary disputes.

Band 2

Carlsmith Ball LLP

Full-service firm Carlsmith Ball handles a wide range of tax, trust and estate matters for wealthy clients, including planning and administration, business successions and charitable giving strategies.

"I know the Carlsmith firm well," says a source, adding: "I know that traditionally it represented trusts and estates, and people with large trusts."

Notable practitioners

Joanne Lo Grimes is "prominent in the community," says a local attorney. She regularly advises tax-exempt entities and trusts on governance matters and fiduciary administration and duties.

Joy Miyasaki is "good and strong in tax,"

Band 1

Cades Schutte LLP

Cades Schutte is "extremely well respected," according to a local interviewee, who also notes that the firm has a "longstanding reputation going back many years."

Sources are particularly impressed with the client service provided by Cades Schutte's attorneys, as well as their technical skills. "The various attorneys work well together and seem to communicate with each other seamlessly. They are professional, thorough in their work, prepared for meetings and pretty quick to respond to requests," explains a source.

according to a local commentator, who adds: “I like her a lot.” Her work includes advising clients on tax and estate plans, asset protection matters and estate administration. Another source says that Miyasaki is “terrific” and a “go-to person for gnarly issues.”

Harry Oda advises clients on trust and estate plans, and also handles corporate matters, commercial transactions and pensions work. “Our dealings have always been good,” says a local estate planner, and another observes that Oda “does a lot of business succession planning.”

Starn O’Toole Marcus & Fisher

Starn O’Toole Marcus & Fisher advises wealthy clients and their closely-held and family enterprises on real estate deals and structures and contentious trusts and estates matters.

“They are an outstanding team. They are deep thinkers, hard workers and very strategic,” says a commentator, adding: “They are the firm that you want on your side of the matter.”

Notable practitioners

Trevor Brown handles major trusts and estate disputes as part of a wider practice that also includes real estate matters. “He is very cerebral but can make the complex simple,” observes an source, adding: “When he takes on a matter he is all in and tireless in his efforts to achieve the best possible results for his clients. He is always thinking multiple chess moves ahead.”

Other Ranked Lawyers

Scott Makuakane brings a significant amount of experience to his trusts and estates matters. “He does both planning and litigation,” says an interviewee, adding: “He is smart, he is thoughtful and he is a good writer. He has ideas that I don’t always think of so he can be very creative.”

Douglas Smith is a “well-respected trust and estate attorney,” says a fellow lawyer. “He is a very high-calibre lawyer, no question about it,” says another commentator, adding: “I’ve worked with him on various trust matters. He is one of those at the top of my list, one to refer work to when conflicted.”

Carroll Taylor is a well-respected trusts and estates attorney who is experienced handling non-contentious and contentious matters. “He is often involved in high-stakes trust litigation and with high net worth clients,” observes an interviewee. Another source says that Taylor “has a deep knowledge of trust law.”

Eric Young is an experienced estate planning expert. He is described as “fabulous” and “extremely smart” by Hawaii sources.

Family/Matrimonial

Family/Matrimonial: High Net Worth
Hawaii
Leading Firms
Band 1
Kleintop & Luria
Rezents & Crowley LLP
Leading Individuals
Band 1
Darrah William C. <i>The Law Offices of (ORL)</i> ◇
Kleintop Charles T. <i>Kleintop & Luria</i>
Luria Timothy <i>Kleintop & Luria</i>
Rezents Stephanie A. <i>Rezents & Crowley LLP</i>
◇ (ORL) = Other Ranked Lawyer.
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Band 1

Kleintop & Luria

Boutique firm Kleintop & Luria is a well-known option for wealthy clients requiring family law expertise.

This specialist firm represents individuals involved in divorce actions, and assists with property division and child custody cases.

Notable practitioners

Charles Kleintop is “a top lawyer from a family law perspective,” states an interviewee,

and another observer says that “he is one of leading practitioners in that area.” He is the firm’s managing partner.

Timothy Luria is “very sharp but problem-solving-oriented,” according to a source, who also says that “he has just got a terrific manner to him.” He handles divorce matters for wealthy individuals, and also advises on pre- and post-nuptial agreements.

Rezents & Crowley LLP

Rezents & Crowley is a well-respected firm that is notable for representing clients in difficult family law matters.

“They obviously know their family law and I’ve seen them handle very contentious divorces, both large and small. I think they have a thoughtful and reasonable approach,” explains a local market commentator.

Notable practitioners

Stephanie Rezents is “just a bright, effective attorney,” says a source, adding: “She just exudes confidence and clients think the world of her. I love working with her because she is so even-keeled.” Rezents handles divorce cases involving businesses, trusts and other high-value assets.

Other Ranked Lawyers

William Darrah handles complex matrimonial matters involving high-value assets and is an experienced alternative dispute resolution practitioner. “I’ve worked very closely with him,” says a local commentator, who adds: “He would be very high on the list. William has done a number of high net worth divorces.”

Accountants & Tax Advisers

Accountants & Tax Advisers
Leading Firms
Accuity LLP
KMH LLP

Accuity LLP

Accuity offers tax, accounting and advisory services to a wide range of business clients, including family-owned enterprises and non-profit organisations.

"I have a positive impression of them," says a commentator. Another source states: *"A number of clients work with them and it is considered to be one of the top accounting firms, definitely."*

Key contact:

Joan Fujita, Managing Pincipal

KMH LLP

KMH is described by Hawaii-based private wealth sources as *"very well respected"* and *"excellent."* This notable accountancy firm advises high net worth clients on tax and estate planning, closely-held business issues and matters affecting non-profit entities.

"I include them in the top tier of service providers in Hawaii," says an impressed attorney.

Key contact:

Alan Yee, Partner

Private Banks

Private Banks
Leading Firms
Bank of Hawaii
First Hawaiian Bank

Bank of Hawaii

Bank of Hawaii is described as *"excellent"* and remains a top private banking choice for wealthy clients, who are also provided with access to fiduciary and investment services and credit facilities.

"They have really core groups to support their high net worth clients," observes a Hawaii-based commentator, who adds: *"They try to service the client, so it's not just a private banking situation, but they do have a team of private bankers that can support the high net worth client. When we have discussions it is very seamless because they understand the*

concepts."

Key contacts:

Ronald Chang, Vice President and Relationship Manager – Kālai Services Group

Stephanie Asato, Relationship Manager – Trust Services Group

May Idolor-Callangan, Vice President and Relationship Manager – Private Banking Group

First Hawaiian Bank

First Hawaiian Bank is a *"good, strong"* financial institution that is notable for the private banking and wealth management services it offers to wealthy individuals and families.

Hawaii interviewees consider First Hawaiian to be a leading fiduciary services provider, and highlight in particular the bank's trust officers. *"I think First Hawaiian Bank is excel-*

lent," states a local source, adding: *"What I really value is that a lot of their trust officers and private wealth people are also attorneys, and that is really helpful."* Another commentator says: *"Many of their trust officers are attorneys, so they understand things, and those who are not attorneys are very good people."*

Key contacts:

Lynn Takahashi, Senior Vice President and Team Leader – Private Banking

Cheryl Tagawa, Vice President and Private Banking Officer

Bradley Itagaki, Vice President, Team Leader and Senior Wealth Adviser

Wealth Managers

Wealth Managers
Leading Firms
Merrill Lynch
Morgan Stanley

Merrill Lynch

Merrill Lynch is *"highly regarded, just reputationally at the top,"* according to a source. It offers wealthy clients investment advice and access to banking and fiduciary services provided by Bank of America.

"They are very good," observes an attorney, who adds: *"They ask their advisers to continually study. All the advisers I've worked with at Merrill Lynch have been extremely supportive*

to their clients and so the clients have a lot of trust in them."

Key contact:

Andrew Meade, First Vice President and Wealth Management Adviser – Kimura Meade Group

Morgan Stanley

Morgan Stanley assists clients with investment plans, and also advises them on estate and business planning and philanthropic activities. *"They are supportive and I've received invitations to events where they try to assist their clients to interact with professionals and learn about new topics,"* observes

a commentator.

"I've worked with some advisers at Morgan Stanley and I definitely think they deserve to be at the top for investment management and portfolio construction," says a source. Dean Spagnoli is described as *"really good"* by another interviewee.

Key contact:

Dean Spagnoli, Senior Vice President and Wealth Adviser