Shumaker

FINANCIAL INSTITUTIONS & INSURANCE

We give financial institutions and insurance clients the strategic guidance and competitive advantage they need to grow and thrive.

Shumaker lawyers have a long history of providing high-quality, dependable legal counsel to financial institution and insurance companies, working as full business partners to craft flexible, creative, and entrepreneurial strategies to help them succeed.

REPRESENTATIVE CLIENTS

- Privately owned and publicly traded banks
- Bank holding companies
- Credit unions
- Non-depository trust companies
- Privately owned and publicly traded insurance companies
- Insurance and employee benefit funds
- Mortgage and nonmortgage loan brokers

OUR CAPABILITIES

- Transactional counsel in mergers, acquisitions, and divestitures, as well as commercial lending activities
- Negotiate and document loan transactions
- Interactions with regulators
- Malpractice claims
- Capital-raising ventures
- Bankruptcy and insolvency proceedings
- Organization of banks, holding companies, and affiliates
- Loan enforcement, workouts, and asset dispositions
- Compliance with reporting obligations under the Securities and Exchange Act of 1934
- Private placements and public offerings of debt and equity proceedings
- Patent, trademark, copyright, and other intellectual property counsel
- Labor and employment issues

100+
Financial Institutions & Insurance Industry Attorneys

Helping Clients Move Forward with Confidence Since
1925

NLJ 500 FIRM
National Law Journal

2026
Best Law Firms®
Best Lawyers®

Stacy RC Berliner
Partner, Financial Institutions & Insurance Industry Sector Co-Chair
216.377.7012 | sberliner@shumaker.com

Steven M. Berman
Partner, Financial Institutions & Insurance Industry Sector Co-Chair
813.227.2332 | sberman@shumaker.com

SHUMAKER.COM →