

Morgan Lewis



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Daniel R. Kleinman is a partner in Morgan Lewis's Investment Management and Securities Industry Practice and a member of the ERISA Fiduciary Services Group. Mr. Kleinman's practice focuses on the fiduciary responsibilities provisions (Title I) of the Employee Retirement Income Security Act and the related tax, corporate and securities laws in connection with the structuring and marketing of investment products (including private equity and hedge funds) and financial services to employee benefit plans. He also handles issues with respect to the regulation of broker-dealers and investment advisers under federal and state securities laws.

Mr. Kleinman received his LL.M. in taxation and his Employee Benefits Certificate from Georgetown University Law Center in 2002, and his J.D. from The Dickinson School of Law in 1997. He received his B.S. from New York University in 1991.

Mr. Kleinman is admitted to practice in the District of Columbia, Pennsylvania, and New Jersey.

practice areas

Investment Management
ERISA/Employee Benefits Litigation
Fiduciary & DOL Matters
Securities Industry
Investment Advisers
Broker-Dealers
Private Equity
Broker-Dealer & Capital Markets Regulation
Private Investment Funds
Exchange Traded Funds
Private Equity M&A
Financial Services
Collective Investment Trusts
Bank & Financial Services Regulatory

bar admissions

District of Columbia
New Jersey
Pennsylvania

practice accolades

Investment Management

Ranked, National Tier 1: Securities/Capital Markets Law, *U.S. News and Best Lawyers* (2013)

Ranked, Band 2: Investment Fund Formation and Management: Mutual/Registered Funds in *The U.S. Legal 500* (2013)

Ranked, Band 2: Financial Services Regulation: Broker-Dealer Regulation in *Chambers USA* (2013)

Ranked, Band 3: Investment Funds: Registered Funds in *Chambers USA* (2013)

ERISA/Employee Benefits Litigation

Listed in the highest tier for National ERISA Litigation Practice in *Chambers USA 2013*

Ranked in Tier 1 for ERISA Litigation by *The U.S. Legal 500* (2013)

Private Investment Funds

Ranked "#1 Most Active Law Firm" globally, based on the number of private equity funds worked on for limited and general partners, by *Dow Jones Private Equity Analyst* (2013)

Ranked, National Tier 1: Private Funds/Hedge Funds Law, *U.S. News and Best Lawyers* (2013)

education

Georgetown University Law Center, 2002, LL.M.

Pennsylvania State University, Dickinson School of Law, 1997, J.D.

New York University Stern School of Business, 1992, B.S.