



## David Lifshitz

Counsel

New York

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David counsels private investment fund managers with respect to a broad range of fund formation and compliance matters.

He advises managers of hedge funds, private equity funds, and other pooled investment vehicles in connection with their structuring, formation, 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. David typically serves as the day-to-day primary client contact on the fund formation matters in which he is involved; he is often the first Lowenstein lawyer to whom clients turn when in need of a rapid response.

David also advises his clients with respect to regulatory and compliance matters. He has particular experience in advising all types of fund managers, including emerging and well-established hedge, private equity, and venture capital fund managers, in the review of their marketing and investor reporting collateral for compliance with the SEC's marketing rules.

## NEWS & INSIGHTS

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### Publications

> September 27, 2017

**"Common Pitfalls in Investment Adviser Advertising: Balancing Marketing Goals with Compliance Obligations,"** *Investment Management Client Alert*

Scott H. Moss, David Lifshitz,

## SPEAKING ENGAGEMENTS

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> **Select Topics for Asset Managers – Summer 2019**, Lowenstein Sandler & ACA Compliance Group, New York, NY, June 6, 2019

## EDUCATION

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> University of Pennsylvania Law School (J.D. 2014)

> The Wharton School (2013), Certificate in Management

> Excelsior College (B.S. 2010)

## ADMISSIONS

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> New York

> New Jersey