

## Fund Finance Friday



### Cadwalader Elects New Partners and Promotes New Special Counsel and Counsel

December 19, 2025

#### Cadwalader Elects New Partners and Promotes New Special Counsel and Counsel

Cadwalader has elevated 24 lawyers to partner, special counsel and counsel, effective January 1, 2026.

Special congratulations to the fund finance lawyers promoted in this class: **Katie McShane** (Partner, New York), **Jordan Ballard** (Counsel, Charlotte), **Jonny Byrne-Leitch** (Counsel, Charlotte), **Brian Kettmer** (Counsel, Charlotte), **Brian Kurpis** (Special Counsel, New York), **Olivia Stewart** (Special Counsel, Charlotte) and **Clay Talley** (Special Counsel, Charlotte).

“We’re thrilled to share this news,” said Pat Quinn, Cadwalader’s Co-Managing Partner. “The past year has been one of the most successful in our firm’s storied 233-year history. Our strong performance is thanks to the extraordinary talent that Cadwalader has long been known for. Our new partners, special counsel and counsel will carry forward this legacy.”

Co-Managing Partner Wes Misson added, “Cadwalader remains the premier destination for elite lawyers to thrive and achieve winning results for clients who trust us to handle their most important and complex matters. These 24 new senior lawyers, coupled with the over 95 new attorneys who have joined our firm in 2025, underscores that we are a people business, and people are and will always be Cadwalader’s greatest asset.”

#### Our new partners include:

**Peter Bariso**, Corporate (New York) – Pete’s practice covers a broad range of transactional matters. He represents both public and private companies, financial sponsors and investment managers in mergers, acquisitions, divestitures, carve-outs, securities offerings, spinoffs, joint ventures, investments, financings, restructurings and other complex transactions. In addition, Pete advises companies and boards of directors in an array of governance, shareholder engagement, securities laws and commercial matters.

**Jack Kelly**, Funds (London) – Jack’s practice involves advising sponsors and asset managers on the structuring, formation and promotion of real estate funds (including REITs), credit funds, private equity funds, infrastructure funds and funds established to invest in emerging markets (including blended finance funds). Jack has over a decade of experience advising on complex multi-jurisdictional fund structures and has expertise in both private funds and publicly listed investment companies.

**David Kiernan**, Capital Markets (London) – David focuses on a wide range of capital markets and financing transactions, with an emphasis on structured finance and securitization. He has experience advising financial institutions and asset managers in connection with international finance transactions across a variety of traditional and esoteric asset classes, CLOs, middle-market facilities, back leverage facilities and other loan warehouse facilities.

**Ryan Leverone**, Corporate and Commercial Finance (New York) – Ryan represents lenders and borrowers in a wide variety of domestic and cross-border financing transactions, including working capital financings, NAV facilities, asset-

based loans, acquisition financings, note purchases, workouts, repurchase financings and other complex transactions. He also represents financial institutions in the purchase and sale of debt on the secondary loan trading markets, including bespoke participation arrangements. Ryan also focuses on emerging technologies impacting financing transactions.

**Katie McShane**, Fund Finance (New York) – Katie represents major banks and other financial institutions in the structuring, negotiation and documentation of subscription credit facilities, as well as NAV-based, hybrid and other nontraditional fund finance transactions to a broad range of private equity funds. She has experience representing investment banks and private equity groups in their role as issuer, underwriter and mortgage loan seller in both public and private securities offerings. Katie has also represented clients in other asset-backed finance and corporate transactions and has practiced in both London and Dublin.

**Matthew Peters**, Real Estate (London) – Matt focuses on corporate real estate and real estate private equity, including corporate and investment property acquisitions and disposals, joint ventures, and corporate restructurings and reorganizations, particularly with regard to hospitality and leisure, residential, student accommodation, data centers and logistics sites, with a focus on developments. He has experience advising both UK and international clients operating across a variety of jurisdictions throughout EMEA.

**Jodie Valler-Feltham**, Corporate (London) – Jodie advises domestic and international clients on a broad range of complex corporate transactions across a wide variety of sectors, including life sciences, technology and financial services. He specializes in mergers and acquisitions (both public and private), co-investments, joint ventures, equity fundraisings, reorganizations and equity capital markets matters.

#### **Our new special counsel and counsel include:**

**Michael Altman**, Special Counsel, Capital Markets (New York) – Mike's practice focuses on representing issuers, underwriters and mortgage loan sellers in both public and private commercial mortgage-backed securitization transactions. He also has experience handling Exchange Act filings, including public registration statements for new and repeat issuers.

**Jordan Ballard**, Counsel, Fund Finance (Charlotte) – Jordan represents banks and financial institutions in negotiating subscription based finance transactions, including hybrid facilities, umbrella facilities, syndicated facilities, term loan facilities, subordinated tranche facilities and various other types of fund financing transactions. Jordan has represented clients in some of the largest facilities in the market.

**Jonny Byrne-Leitch**, Counsel, Fund Finance (Charlotte) – Jonny represents bank and non-bank lenders across subscription-line finance transactions, hybrid facilities, umbrella facilities and other types of bespoke fund financing transactions. Jonny regularly acts as lead counsel for Cadwalader clients and is responsible for negotiating complex agreements and overseeing deals from inception to completion.

**Michael Ena**, Special Counsel, Financial Services (New York) – Michael's practice focuses on derivatives, structured financial products and financing transactions. Michael has represented financial institutions and corporate clients in connection with a broad range of equity derivatives, cryptocurrency and other digital asset derivatives, debt total return swaps, credit default swaps, repurchase and reverse repurchase transactions, interest rate and foreign exchange derivatives, financing arrangements, capital relief trades and matters involving convertible, exchangeable and equity-linked securities.

**Michelle Gellman**, Special Counsel, Financial Services (New York) – Michelle's practice focuses on complex structured finance and derivatives matters. She advises clients on a wide range of OTC derivatives products, structured finance products, municipal finance products and other structured transactions that combine securitization techniques and derivatives.

**Michael Glenn**, Special Counsel, Global Litigation (New York) – Michael has substantial experience representing plaintiffs and defendants in a wide range of litigation and crisis management matters involving complex legal issues. He has advised a wide range of clients at all stages of litigation, including pre-suit factual development and legal research, fact and expert discovery, dispositive motion practice, trial and appellate proceedings.

**Eunji Jo**, Special Counsel, Real Estate (Charlotte) – Eunji's practice focuses on the origination of complex real estate loans of all balance sizes and exit strategies, including those intended to be held for investment and those intended to be syndicated or securitized. She advises financial institutions on a broad range of real estate finance matters,

including the acquisition, financing and disposition of all types of properties, including office, retail, hotel, industrial, data centers, self-storage, multifamily and mixed-use properties.

**Aaron Kennedy**, Special Counsel, Capital Markets (Charlotte) – Aaron's practice focuses on commercial mortgage-backed and CRE CLO securitization transactions, warehouse lending and the workout and restructuring of securitized and other financial assets. Aaron represents investment banks and financial institutions in their roles as issuers, underwriters, placement agents and mortgage loan sellers in both public and private offerings of commercial mortgage-backed securities and other structured finance products and in their role as repo buyers in the context of warehouse lending.

**Brian Kettmer**, Counsel, Fund Finance (Charlotte) – Brian represents banks and financial institutions in negotiating subscription-based finance transactions, including NAV-based facilities, hybrid facilities, umbrella facilities, subordinated tranche facilities, term loan facilities and various other types of fund financing transactions. Brian has represented clients in some of the largest facilities in the market.

**Lindsey Kister**, Counsel, Corporate (New York) – Lindsey's practice is concentrated in the area of corporate law, with an emphasis on mergers and acquisitions, securities law, corporate finance and corporate governance. She represents clients in transactions such as public and private mergers, acquisitions, securities offerings, restructurings and joint ventures.

**Brian Kurpis**, Special Counsel, Fund Finance (New York) – Brian focuses on fund finance and represents lenders, financial institutions, insurance companies, private credit firms and investment funds in structuring, negotiating and documenting bilateral and syndicated financing structures, including primary and secondary NAV loan facilities, subscription credit facilities, hybrid transactions, margin loans, GP financings, collateralized fund obligations, rated note feeders and continuation funds.

**John Lambillion**, Special Counsel, Financial Restructuring (London) – John's practice focuses on advising creditors in restructuring and special situations transactions, with a particular focus on complex cross-border restructurings, liability management exercises and financings. John represents banks, private credit funds, CLOs and alternative investment funds with exposures across the credit spectrum, and works closely with our Global Litigation and Leveraged Finance and Private Credit teams.

**Olivia Stewart**, Special Counsel, Fund Finance (Charlotte) – Olivia represents banks and financial institutions in structuring, negotiating and documenting subscription credit facilities, NAV-based facilities, hybrid facilities, umbrella facilities, subordinated tranche facilities, term loan facilities and various other types of fund financing transactions for private equity funds. Her experience extends beyond deal work, and clients frequently engage her to assist in developing form documents and policy.

**Alexander Strom**, Counsel, Financial Restructuring (New York) – Alex's practice is concentrated in the area of financial restructuring with a focus on structured finance and securitizations. He represents lenders in connection with bankruptcy-remote commercial mortgage loan originations, commercial mortgage-backed securitizations and asset-backed securitizations. Alex has significant experience in developing structures designed to protect lenders in these complex securitization and lending transactions.

**Clay Talley**, Special Counsel, Fund Finance (Charlotte) – Clay represents administrative agents, lead arrangers and lenders across subscription-based lending finance transactions, including NAV-based facilities, hybrid facilities, umbrella facilities and various other types of fund financing facilities. He assists in negotiating complex agreements for some of the most sophisticated lenders in the fund financing space.

**Iram Tariq**, Special Counsel, Leveraged Finance and Private Credit (London) – Iram's practice focuses on advising credit funds, borrowers and sponsors on UK and cross-border leveraged financing transactions, including private equity backed buyouts, management buyouts, and refinancing and restructuring of leveraged assets and special situations. She has substantial experience in structuring complex debt arrangements, negotiating loan documentation and addressing cross-jurisdictional issues.

**Jessica Zeichner**, Special Counsel, Capital Markets (New York) – Jess focuses her practice on representing issuers, underwriters and mortgage loan sellers in both public and private commercial mortgage-backed securitization transactions. She also prepares registration statements for new and repeat public issuers, and has experience working on municipal bond refinancings.