HansonBridgett



Jessica M. Karner

Partner

JKarner@hansonbridgett.com
(415) 925-8405

Hanson Bridgett LLP
1000 4th Street, Suite 700
San Rafael, CA 94901

Areas of Focus

- Corporate

Scan for expanded vCard

Jessica's business transactional practice focuses primarily on representing clients in all phases of mergers and acquisition matters, from pre-transaction advising through closing. She has substantial industry knowledge in sales and acquisitions of investment advisory firms, and also works with professional and consumer services companies in a wide variety of industries.

Jessica also regularly serves as outside general counsel to wealth management firms and businesses across a variety of sectors, and in that capacity provides general corporate and business legal advice and assistance to companies at all stages of development.

Jessica has presented on trending topics in business law to professionals in the wealth management industry, CPAs, and other lawyers.

Representative Matters

Jessica has represented the seller in dozens of transactions involving the sale or recapitalization of wealth advisory firms with deal sizes in the range of $200M to below $10M. Her experience includes transactions with the consolidator buyers in the industry and many other types of acquirers or investors, including BlueSpring Wealth, CAPTRUST, Cerity Partners, Creative Planning, Focus Financial Partners, HighTower, Kudu Investment Management, Lido Advisors, LPL, Mariner Wealth Advisors, Mercer Global Advisors, Modera Wealth Management, Wealth Enhancement Group, Wealthspire Advisors/NFP, Corient, and various affiliates of Wealth Partners

Capital Group.

Pro Bono

Jessica is an active member of her community and has volunteered for local nonprofit organizations throughout her career. From 2020 to 2024, she served as President of the Board of Legal Aid of Marin.

Presentations

"Putting the Success in Succession Planning – Legal and Tax Considerations," *co-presenter*, Matson Money Succession Summit (October 2024)

Press

"RIA Owners Risk Lawsuits and Business Loss if They Share Client Details Before M&A Closings," *Financial Advisor IQ* (November 2019)

"How to Succeed in Succession," *Financial Advisor Magazine* (January 2019)

"Top 10 Ways to Prepare a Business for Sale and Enhance Its Value (Including Some Things Buyers Should Evaluate During Due Diligence)," *The Marin Lawyer* (November 2013)

"Baskets and Snakes: Allocating Risk Through Representation," Warranty and Indemnification Provisions, *The Marin Lawyer* (November 2008)

"Political Speech, Sexual Harassment, and a Captive Workforce," *83 California Law Review 637* (1995)

Honors & Awards

Martindale-Hubbell, AV Preeminent ®

Beacon of Justice Award, Legal Aid of Marin

Professional Affiliations

Legal Aid of Marin, President of the Board (2020-2024)

State Bar of California, Business Law Section, Intellectual Property Section, Member

American Inns of Court, Richard M. Sangster Chapter, President (2015-2016)

Marin County Bar Association, President (2012), Business Law, Intellectual Property, and Diversity Section, Member

Academic Distinctions

California Law Review, Editor in Chief

Thelen Marrin Award for Scholarship

Order of the Coif, Member

Education

J.D., University of California, Berkeley School of Law (1995)

B.A., *with high distinction* University of California, Berkeley (1991)

Admissions and Courts

California