David M. Mosier

Practice Concentration

- Mergers, Acquisitions and Divestitures
- Employee Benefits
- Tax Law
- Corporate Law
- Business Law

Firm Involvement

- Shareholder
- Business & Tax Group, Chairman

Admissions & Certifications

- Pennsylvania, 1981
- U.S. District Court Western District of Pennsylvania
- U.S. Tax Court

Professional Affiliations

- Erie County Bar Association
- Pennsylvania Bar Association
- Lawyers Associated Worldwide, Firm Liaison

Mr. Mosier’s practice includes merger and acquisition transactions and general business and tax matters. He serves as the firm’s liaison to Lawyers Associated Worldwide. His practice also includes life and death planning for retirement benefits, distributions and beneficiary designations. Mr. Mosier also designs and drafts employee pension and welfare benefit plans and represents plan trustees and administrators.

Education

- Cleveland State University, 1981, J.D.
  Cum Laude
  Cleveland Marshall Law Review, Member, 1979 –1981
- John Carroll University, 1978, B.S.
  Cum Laude

Recent Accomplishments

- represented Wells Fargo Insurance Services, Inc., a large bank affiliated insurance brokerage firm, in the multi-million dollar acquisition of an insurance agency in Spokane, Washington
- represented Wells Fargo Insurance Services, Inc. in the acquisition of an insurance agency in Indiana
- represented ABD Insurance and Financial Services in the acquisition involving the sale of personal good will in addition to corporate assets
- represented Wells Fargo Insurance Services, Inc. in various insurance agency acquisitions in Michigan, New Jersey and other states

Speaking Engagements & Publications

- Mercyhurst College, Adjunct Professor
- Energy Opportunities in North and South America
- Leverage 401(k) Plan with Cross-Testing to Maximize Key Employee Benefits
- Cash Balance Retirement Plans: An Introduction
- Stimulus Opportunities
- Argentinean Opportunities
- Beneficiary Designations: Keep Them Current
- Converting a Traditional IRA to a Roth: Clues to Resolving a Confusing Conundrum (With Conversion Calculation Tables)
- Pension Protection Act of 2006
- Tax Free Distributions From IRA’s For Charitable Purposes
- Doing Business in China: Opportunity or Misadventure?
- Roth 401(k) Accounts as an Estate Planning Tool
- Planning for Assets Out of State and Out of the Country
- Doing Business in Northwestern Pennsylvania
- Allocating Certain Plan Expenses to Individual Participants’ Accounts in Profit Sharing Plans

Community and Professional Service

- Presque Isle Rotary Club, Board of Directors
- Northwest Pennsylvania Trail Association, Member and Solicitor

KNOX McLAUGHLIN GORNALL & SENNETT
Attorneys & Counselors

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