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Paying It Forward: Shipman & Goodwin Managing Partner Alan Lieberman Stepping Down at Year-End

Shipman & Goodwin's outgoing leader said it has been an honor to serve in the profession and to help others, "particularly those who are less fortunate, and in being dedicated to the community."

By Michael Marciano

TV courtroom dramas may portray tax attorneys as among the least thrilling in the legal field, but for Shipman & Goodwin managing partner Alan Lieberman, the vocation has been a ticket to both great success and 38 years of inspiration.

The Hartford-based leader said he'll be closing the final chapter of his career at the end of the year to focus on family and personal pursuits, but he expressed gratitude and pride in both his firm and his work, which have always been focused on helping others.

Lieberman, 64, announced Wednesday that after five years at Shipman's helm he is ready to transfer command to an undisclosed new leader, and in 2021 he will take the opportunity to spend more time with his wife, children and grand-

children, whom he called "incredible motivators for the consideration of retirement."

"Obviously, you get to a certain age where retirement is always part of your planning," Lieberman said in an interview Wednesday. "Talking with the family and listening to them about what they would like me to do, I told them that I would like to help out in certain areas, and this was as good a time as any."

Lieberman said he will carry out his responsibilities through the end of the year, working with Shipman's management committee, partners, general counsel and administrative chiefs as the firm identifies its next leader, expected to be announced in November. In the meantime, the primary order of business will be addressing any issues brought on by the COVID-19 pandemic and



Alan Lieberman, managing partner at Shipman & Goodwin in Hartford, Connecticut. Courtesy photo

ensuring a successful transition into "the new normal."

Though Lieberman said the pandemic was not a direct factor in his decision, he acknowledged that helping steer Shipman & Goodwin through the crisis this year has been a major task, with the 150 lawyer-strong firm rising to the challenge.

“There are a lot of people who care deeply about this place and who will be able to see it through its next 100 years,” he said. “So the timing just all came together. If there is a COVID factor, it’s being able to help my children, who are trying to homeschool their kids while they’re dealing with their own stresses.”

Sought by businesses ranging from mom-and-pops to multinational corporations, Lieberman said his primary motivation has been helping others.

“It is an honor to be part of a profession that I think has as an underlying philosophy of doing what you can for other people, particularly those who are less fortunate, and in being dedicated to the community that you serve,” Lieberman said. “We at the firm derive so much from being in Hartford, in Connecticut and elsewhere, and we understand the social compact, that we need to give back to those communities because they give so much to us.”

At the same time, Lieberman said this year has been historic, with Shipman and all law firms experiencing rapid changes.

“It’s a watershed moment in terms of how we work with one another, and how we collaborate with our clients,” he said. “Our use of technology has probably jumped 10 years, so it’s been a period of dramatic change. People talk about the return to a new normal, but it’s going to

be a very different normal in many ways, including how we look at offices, occupancy and technology, and how we interact with our clients and each other.”

Lieberman said economic and social upheaval has magnified that sense of duty, hopefully for the better. “The social justice initiatives that are going on now I hope are going to make not only for a better world, but also a better legal industry,” he said. “If you don’t embrace the opportunity and change when these events occur, you don’t evolve. A successful business will understand what those opportunities are, embrace them and ultimately take advantage of them.”

For Connecticut, where Lieberman counsels businesses and regularly lectures and advises on public tax policy, opportunities are arising daily. New residents flooding in from New York represent a growing client base and local businesses continue to seek tax reforms.

Staying ahead of these issues will be central to the success of all law firms, he said. “The influx of new residents I think will have a very positive impact on the economy,” Lieberman said. “I actually look forward to seeing how that ultimately plays out. You may not see it right away, but I think it can’t help but be a positive moving forward.”

The 1982 graduate of the University of Michigan School of Law

joined Shipman & Goodwin that fall. As a member of the firm’s tax and employee benefits practice, he counseled clients on matters involving international, federal, state and local taxation and represented parties of all sizes in tax-related disputes and administrative proceedings. While serving as managing partner, Lieberman also chaired the firm’s management committee.

In addition to representing clients and leading the firm, Lieberman has co-authored tax provisions for Connecticut’s financial sector and developed administrative pronouncements with the state Department of Revenue Services. He edited “Taxes on Connecticut Business & Industry,” published by the Connecticut Business & Industry Association, and served on many tax-related state boards and commissions.

“We will miss Alan on every level,” said Karen Staib, a member of Shipman & Goodwin’s management committee. “He is a great person with a deep and abiding commitment to the people that make up this institution and to its clients. Many of us have benefited from his mentoring, his insight and his knowledge.”

Going forward, Lieberman said Connecticut’s business community still faces “a number of challenges” that state leaders should address. “I think there needs to be a better balanced approach to both

appropriations on the one hand and revenue generation on the other,” he said. “Very often in this state those two concepts are split, so we determine the spending side first, and the revenue side becomes a filler. There needs to be a well-considered, broad-based look at our taxation system, where we have tax structures that are anti-competitive and fundamentally become obstacles for people to be successful in business here.

“A case in point is state taxation on job training,” Lieberman noted. “We have a sales and use tax on training, so business owners in Connecticut who are trying to stay competitive are being taxed on that. Of all the things in the state you would think you’d want to promote, it’s training, so why would you put a 6% cost on it?”

Eliminating that tax, he reasoned, would promote growth and almost assuredly pay for itself via increased revenue. “The problem is that people look at the cost of losing the sales and use tax without thinking of how much benefit there would be from increased income tax collection.”

That said, Lieberman agrees tax policy is complicated, and there is rarely a simple solution. “It really does require you to take a much more holistic approach and step

back to see what makes sense at the end of the day,” he said. “Too often it gets distilled down into simple concepts that often miss the underlying mark. You’ve got to be able to draw a much closer nexus between how the tax system works and ultimately its impact on business.”

But strides have been made, particularly related to the balancing of the Connecticut taxation of resident and non-resident businesses and individuals, and the state’s response to the federal limitation on the deductibility of state and local taxes adopted during the Trump administration. Ultimately, he said, “there is still much work to be done.”

In addition to working with small businesses and international corporations such as Lego and Walmart, Lieberman has instructed students at the University of Connecticut and has spoken to Connecticut business groups and state and local bar associations.

“It’s been a very interesting mix of clientele,” he said, “and there are lessons learned working with everyone in that type of situation. It’s an honor to be part of a profession that I think has an underlying philosophy of doing what you can for other people and in being dedicated to the community that you serve.”

Beyond his work helping Connecticut residents and business

owners better understand taxation, Lieberman is an honorary director and former president of the Channel 3 Kids Camp and former president of the Hartford Club.

Lieberman’s advice to fellow attorneys and to people in general is to do what you love to do. “Being a partner and a managing partner comes down to finding something you really enjoy every day,” he said. “You will embrace it and ultimately have the dedication to not only love your craft, but to practice it at its highest level, and everything else flows from that.”

The outgoing firm leader added that, while he will be focusing on spending more time with his family in the coming year, he expects to be called on from time to time to help and advise lawyers at Shipman and others in the community.

“I hope there are things I can offer to our communities and help out in whichever way I can,” he said. “That’s been my approach since I came to this area in 1982, and it will continue to be so. I think it’s important to make contributions and continue to pay it forward.”

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