



Client: Health Advocate



## SELLING YOUR HEALTH CARE COMPANY

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Health Advocate, the nation's leading independent provider of health care advocacy services, has relied on Cozen O'Connor as its outside general counsel since it was a 14-person startup. Over the last 11 years, Health Advocate has sought the firm's advice on everything from compliance to capitalization. Recently, the company utilized the full range of Cozen O'Connor's corporate capabilities to complete its lightning-speed acquisition by Omaha-based West Corporation for nearly \$265 million. The complex deal involved attorneys from corporate, tax, labor and employment, employee benefits, intellectual property, health, environmental and antitrust.

While there were many complexities to agree upon, West and Health Advocate shared a common view that they wanted to expeditiously complete the deal to begin realizing the value of joining forces. Health Advocate's executive vice president of business strategy, Dan Messina, said, "Cozen O'Connor clearly understood our objectives. They were able to move much more deftly than most law firms would have expected to on a deal of this size. Additionally, Cozen O'Connor's steady hand fine tuning the terms of the deal kept both sides focused on the rewards of the end game."

The shared impetus for moving quickly also stemmed from wanting to capitalize on Health Advocate's already impressive growth record and its talented workforce. During the notably amicable negotiations, Iris Davis Brownstein, Health Advocate's general counsel and corporate secretary, said, "Cozen O'Connor certainly stepped up on our behalf to push for changes that would meaningfully protect our 600 employees. The firm also helped structure the deal to avoid surprises down the road and ensure that we got the fairest value possible."

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### CASE STUDY DETAILS

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