



BUSINESS TAXATION

“What separates us from the pack is how we apply our industry experience and collaborate with other professionals within the firm to deliver highly cost-effective and focused advice tailored to the client’s needs.”

WHO WE ARE

We speak tax in business terms. We don’t work in a tax vacuum. Our team is a diverse group experienced in representing and advising clients in all areas of federal and state tax law, with knowledge in and out of the tax arena. We take a collaborative approach that, combined with our background and experience, allows us to tailor a plan for our client’s specific needs. Our main areas include transactional tax or general business structure advice and tax controversy guidance. For our clients, we have a planning practice that is heavily structured in real estate transactions, private equity transactions, and mergers and acquisitions.

HOW WE HELP

We go out of our way to ensure a transparent collaboration with our client’s certified public accountant, other tax professionals, and trusted industry advisors. We aim to build a relationship and get everyone on the same page, so there are no surprises when filing – working closely with the clients and the deal team to deliver what they need. Putting a modern take on a tax practice, we do not let tax alone drive the business deal.

WHO WE REPRESENT

Our clients are CFOs, Directors of Tax, and individual business owners. We represent clients in various industries:

- Education
- Healthcare
- Non-profit
- Real estate
- Transportation
- Manufacturing

REPRESENTATIVE MATTERS

- Representation of sponsors and developers in historic rehabilitation tax credit transactions for both state and federal tax credits
- Representation of individuals and entities in Section 1031 like-kind exchange to include reinvestment and tenants in common agreements
- Representation in cases of Trust Fund Recovery Penalty Assessments
- Representation during examinations, appellate, and Tax Court divisions regarding penalty assessments and abatements
- Advising tax-exempt organizations, governmental issuers, and underwriters on tax matters relating to the issuance of tax-exempt bonds and post-issuance tax compliance
- Tax structuring of merger and acquisition transactions including private equity investments, F Reorganizations, 338/336 elections and tax-free reorganizations