

CAPABILITIES / BUSINESS & FINANCE

## Tax

Providing experienced counsel and representation on complex federal, state, and local taxation issues for private and public clients.

### OVERVIEW

*"The attorneys on Obermayer's Tax team understand our clients' tax problems, understand our clients' objectives and goals, and offer them a practical solution."*

— Pauline Markey

Obermayer's tax group provides advice, planning and dispute-resolution services relating to federal, state and local taxation for businesses, nonprofit organizations, estates, trusts and individuals. Clients turn to the attorneys on our Tax team when facing sophisticated tax issues, including:

- The formation, acquisition and disposition of closely-held businesses, real estate joint ventures and other businesses
- Mergers, acquisitions, and reorganizations
- Formation and operation of tax-exempt organizations
- Real estate transactions, including 1031 exchanges
- Charitable giving; and,
- Tax-exempt bond financing and tax aspects of employee benefit plans

Our tax attorneys represent clients before the Internal Revenue Service, state and local tax tribunals and in federal and state courts.

### Our Value

Some people hear "tax" and have a visceral, negative reaction, even though they understand that tax is part of everyday business. We take that worry off their plate.

### Our Clients

Counties, government agencies, and other public authorities regularly turn to the members of Obermayer's Tax practice. These and other private clients rely on our attorneys when confronting a nonprofit issue, tax planning, and other tax-related

concerns.

**EXPERIENCE**

- Provided legal advice regarding legal entity rationalization and reorganization to optimize structure and reduce federal and state taxes.
- Served as bond counsel for multiple issuances of multifamily conduit revenue bonds by a public government authority for a total of approximately \$75.7 million.
- Served as bond counsel for the issuance of general bond obligations by a local school district for approximately \$29.78 million.
- Served as legal counsel to a public government authority in reviewing and interpreting a local state’s statutes regarding its Section 529 Plan.
- Provided legal advice to several major private foundations regarding administrative procedures, contributions, and maintenance of tax-exempt status.
- Represented various clients in front of the IRS, state department of revenues, and department of labor to negotiate for the reduction of federal and state taxes and penalties.

**ATTORNEYS**

**Key Contacts**

**Warren W. Ayres**

PARTNER  
215.665.3124  
warren.ayres@obermayer.com

**Pauline W. Markey**

PARTNER  
215.665.3222  
pauline.markey@obermayer.com

**Joel Clymer**

ASSOCIATE  
856.857.1432  
Joel.Clymer@obermayer.com

**Hercules W. Grigos**

PARTNER  
215.665.3088  
grigos@obermayer.com

**Samantha J. Koopman**

ASSOCIATE  
215.665.3045  
Samantha.Koopman@obermayer.com

**Barbara E. Little**

ASSOCIATE  
215.665.3257  
barbara.little@obermayer.com

**David A. Nasatir**

VICE CHAIR  
215.665.3036  
david.nasatir@obermayer.com

**Karen M. Sanchez**

PARTNER  
215.665.3297  
karen.sanchez@obermayer.com

**Stephanie J. Sprenkle**

PARTNER  
215.665.3200  
stephanie.sprenkle@obermayer.com

**Michael P. Weinstein**

OF COUNSEL  
215.665.03148  
michael.weinstein@obermayer.com

**RELATED CAPABILITIES**

- |                                    |   |
|------------------------------------|---|
| Business Succession Planning       | Real Estate                               |
| Charitable Giving                  | Real Estate Developers, Investors & REITs |
| Estate Planning & Asset Protection | Trust & Estate Administration             |
| Executive Compensation & Employee  | Universities & Secondary Schools          |

Executive Compensation & Employee Benefits

Universities & Secondary Schools

Fiduciary Litigation

Health Care

International Businesses

Local Governments & Municipal Authorities

Nonprofit Organizations