

Zachary P. Alexander

Partner

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Zachary Alexander focuses his practice on tax issues related to corporate mergers and acquisitions, partnerships (including private investment partnerships and limited liability companies), and state and local taxation. Zach also lends tax advice to the firm's investment management/mutual fund and banking practices and handles tax controversies. He regularly advises clients on tax planning with respect to entity formation and operation, multi-state taxes, and corporate acquisitions and dispositions.

RESULTS

- assisted a public company with the federal and state tax aspects of restructuring transactions within its consolidated group
- advised a public company of state tax issues in connection with its multi-state operations
- represented a large privately held company in a state tax controversy involving apportionment computations
- negotiated and drafted the tax provisions in credit agreements for lending institutions in the asset-based lending space
- advised clients on the tax aspects of acquisition and disposition transactions involving sellers and private equity purchasers, including tax structures for rollover equity of owners
- represented a client in connection with participation in the IRS Offshore Voluntary Disclosure Program
- represented banks in connection with the planning and tax issues associated with acquisitions, including the impact of state financial institutions taxes

SPEAKING ENGAGEMENTS

- Panelist, "Domestic Tax Update for Funds and Management Companies," Investment Company Institute's Tax & Accounting Conference

RECOGNITION

- *Martindale-Hubbell*, AV Preeminent rating

FOCUS

Tax
State & Local Tax
Tax Planning & Transactional Tax
Tax Credits & Incentives
Investment Management Tax
Institutional Investors
Mergers & Acquisitions

BAR ADMISSIONS

Pennsylvania
District of Columbia

COURTS

U.S. Supreme Court
U.S. Tax Court
U.S. Court of Appeals for the District of Columbia Circuit
Pennsylvania Supreme Court

EDUCATION

LL.M. in Taxation, Georgetown University Law Center
J.D., Catholic University of America Columbus School of Law
B.A., University of Maryland

MEMBERSHIPS

American Bar Association, Section of Taxation
Advisory Committee, Philadelphia Tax Conference
District of Columbia Bar Association
Pennsylvania Tax Advisory Committee, Pennsylvania Department of Revenue
Philadelphia Bar Association, Tax Section

