

## Irwin M. Latner

### Chair, Family Office

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Irwin Latner is chair of the firm's family office practice group. For over 30 years, he has been a trusted legal adviser representing family offices, private investment funds and asset managers in various investment fund and platform formations, regulatory and compliance matters, and related transactional matters.

Irwin regularly counsels family offices in all aspects of their business and family investment platforms, including building single-family office and multi-family office structures, regulatory compliance and direct investment transactions, as well as partnering and co-venturing with third-party asset managers and other family backed groups.

Irwin's practice includes representing investment funds and managers pursuing a broad range of liquid, illiquid and hybrid investment strategies, including direct lending funds, permanent capital vehicles, structured credit funds, pledge funds and single investor funds, as well as traditional hedge, private equity, real estate, venture capital and energy/infrastructure funds. In addition to the fund formation work, Irwin also advises managers and sponsors on SEC, CFTC and other compliance matters, seed and joint venture transactions, and upper-tier management company structuring and compensation arrangements, as well as underlying portfolio company transactions. Irwin also advises emerging companies and several crowdfunding and online investment platforms.

Irwin has a sophisticated understanding of how to build customized investment platforms, international investment and tax structuring, implementing novel partnership and joint venture structures, and strategic approaches to raising capital, and is frequently sought after in the private funds and family office industries on these topics. Through his established network, Irwin also assists clients by making strategic connections to potential funding sources, co-investment partners, consultants, key employees and vendors.

#### FOCUS

Private Investment Funds  
Corporate & Securities  
Private Equity  
Mergers & Acquisitions  
Financial Services  
Family Office

#### BAR ADMISSIONS

New York  
New Jersey

#### COURT ADMISSIONS

New York Supreme Court  
New Jersey Supreme Court  
U.S. District Court for the District of  
New Jersey

#### EDUCATION

J.D., *magna cum laude*, Brooklyn Law  
School  
B.A., Rutgers College



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## RESULTS

Irwin's experience includes the representation of:\*

- a large international family office in building out a U.S. private equity investment platform to invest in telecom-related assets and rollups, and related structuring and regulatory guidance to fit within SEC investment adviser registration exemptions as well as exemptions from CFIUS review
- a \$275 million private equity fund formed to invest in various infrastructure and clean energy projects in Southeast Asia and other emerging markets
- a \$250 million private equity fund formed by a family office to invest in high-growth potential healthcare companies across various lifecycle stages, particularly those in the neuro-musculoskeletal space
- a multi-billion dollar hedge fund manager in forming multiple onshore/offshore emerging market funds to make opportunistic event-driven investments in equity and debt securities in Latin America and other emerging markets
- a short-term high yield debt fund manager in a joint venture with a large international family office who provided seed capital and access to an international investor base
- a number of hedge fund managers in forming regionally focused funds to invest in India, Japan, Europe, Brazil, Argentina and elsewhere, as well as sector-focused funds investing in healthcare, telecom and media, food and beverage, REITs and real estate derivatives, precious metals, and energy and energy derivatives
- a multi-billion dollar hedge fund manager in forming multiple onshore/offshore master-feeder funds and separately managed accounts to invest in CLOs, CDOs, TRUPs, leveraged loans and other asset-backed securities and structured credits
- a U.K. manager in forming a \$130 million special situations private equity fund focused on equity, debt and receivables of U.K. companies with £5 million to £100 million in annual turnover
- a retired hedge fund manager in forming his own single-family office investment platform and related estate planning work
- a mid-sized private equity style real estate fund formed to invest in multi-family, mixed-use and hospitality properties as well as historical tax credit opportunities
- a first-time private equity real estate fund formed to acquire limited-service hotels in select geographic markets, together with a joint venture between the sponsor and a family office to provide seed capital for the fund and a portion of the sponsor equity commitment
- a hybrid fund focused on equity and debt investments in companies engaged in real estate financing, auto-export financing and litigation funding



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- a real estate private equity fund focused on distressed properties along the Gulf Coast
- a \$140 million private equity continuation fund to hold cell tower properties and assets in India
- an \$80 million art fund formed to invest primarily in modern and contemporary works of art and involving the founder of an internationally-renowned fine arts gallery
- a pledge fund formed to make early-stage venture investments in telecom, space and technology companies
- a targeted private equity fund of funds formed to invest in an underlying real estate private equity fund which makes equity investments in multi-family properties
- an Israeli venture capital fund formed to invest in late-stage technology companies and crypto assets
- a venture capital fund manager in forming multiple funds to invest in early-stage private companies and a limited number of other venture capital funds dedicated to early, mid and growth-stage companies
- several real estate opportunity zone funds formed to take advantage of the tax benefits afforded to qualifying investments in opportunity zone funds under Sections 1400Z-1 and -2 of the U.S. Internal Revenue Code
- several continuation funds and secondary transactions designed to convert end of term illiquid assets funds into viable ongoing structures in order to maximize asset values and provide liquidity options for investors
- several single investor funds and/or single asset funds for institutional investors in specific assets and/or investment structures that reflect highly negotiated and customized terms, both on a standalone basis and in parallel with the sponsor's primary commingled fund
- reviewing investment transactions in private funds and emerging companies for several single-family offices
- advising several family offices on SEC and CFTC family office registration exemptions
- representing a non-U.S. family office in transitioning the residency of certain family members to the United States and advising on related tax planning and other strategic issues
- numerous fund managers in registering as an investment adviser with the SEC and as a commodity pool operator with the CFTC
- several hedge and private equity fund principals in business separation agreements and retirement packages
- a large hedge fund and private equity fund manager in designing and implementing carry participation structures and other compensation arrangements for its portfolio managers and other employees

\*Includes representations prior to joining Stradley Ronon.

