

Tax

Our firm has extensive experience in handling a broad range of tax matters for businesses, executives and owners of businesses, including the following:

- Structuring the purchase and sale of businesses and the financing of business transactions for regular corporations, subchapter S corporations, and venture capital funds;
- Structuring tax-free reorganizations, including tax-free spinoff transactions;
- Structuring real estate and real estate financing transactions with partnerships and limited liability companies, including real estate syndications and like-kind exchange transactions;
- Planning estate and business succession, including advice to owners of businesses about alternative strategies for transferring the ownership of their business to family members and/or successor management so as to minimize the income, gift and estate tax cost of these types of transactions. Several of our attorneys who practice in this area also have extensive experience with ESOP and ESOP related transactions;
- Advising owners of businesses that have a large concentrated position in the publicly held securities of one company about alternative diversification strategies;
- Representing clients in both federal and state courts (including the Tax Court) in controversies with federal and state taxing authorities;
- Advising companies about a broad range of employee benefit issues, including qualified retirement plans, 401(k) plans, and cafeteria plans;
- Advising companies and executives about a broad range of executive compensation issues, including incentive stock option plans, stock bonus plans, non-qualified stock options, and stock appreciation rights plans;
- Advising non-profit entities about the broad range of tax issues that are applicable to tax exempt entities, including the private foundation rules that are applicable to most family foundations; and,
- Advising clients about the broad range of issues that are involved in charitable gift planning, including the creation and management of family foundations.

Publications & Alerts

- North Carolina's New Forced Combination Statute