

Richard E. Peterson

Partner

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With a deep breadth of experience in a wide variety of tax matters, Richard Peterson is uniquely positioned to handle both regulated investment company, investment fund and corporate mergers and acquisitions tax-related matters.

He advises on partnership tax planning, including the structuring of U.S. and global investment capital funds of all types and advises potential investors. Rich has been involved in significant corporate transactions and divestitures, including taxable and tax-free transactions with both asset and stock acquisitions. Rich is also well versed in tax litigation, covering all aspects of IRS controversy work, from audits and appeals work through litigation before the U.S. Tax Court.

Leveraging his extensive knowledge of real estate investment trusts (REITs), Rich has represented various publicly traded and privately held REITs in issuing tax opinions and advising on several REIT conversions, offerings and other transactions. He also serves as tax counsel to governmental issuers, conduit borrowers and exempt organizations regarding various tax exemption matters to corporations and other entities regarding various state and local tax matters.

RESULTS

- Represented TradePMR, a custodial and portfolio management platform for Registered Investment Advisors (RIAs), in an approximately \$300 million acquisition by Robinhood Markets, Inc.
- Advised Franklin Templeton in the launch of Franklin Crypto Index ETF, a new index-based, digital asset backed exchange-traded product.
- Advised on numerous mutual fund reorganizations.
- Advised the independent board of directors of several mutual funds.
- Advised both public and private offerings of cryptocurrency funds.
- Advised several family offices regarding maximizing the tax efficiency of family investment funds.
- Advised several funds with regard to the specific tax needs of their investors including tax-exempt organizations, university endowment funds, private retirement plans, state retirement plans and sovereign wealth funds.

FOCUS

Tax
Mergers & Acquisitions
Corporate & Securities
Investment Management Mergers & Acquisitions
Investment Management Tax
Emerging Companies & Venture Capital
Private Equity
Nonprofit & Religious Institutions

BAR ADMISSIONS

Illinois

COURTS

U.S. Tax Court

EDUCATION

J.D., Columbia Law School

B.S., DePaul University

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- Handled competent authority matters pursuant to tax treaties the United States has with other countries.
- Advised both creditors and debtors about tax issues involved with both filed bankruptcy cases and private workouts.
- Advised on several complex tax-free 1031 exchanges, involving multiple owners with different intentions and multiple properties.
- Advised on the acquisition and disposition of several luxury hospitality properties both within and outside the United States.
- Advised major private universities with respect to IRS tax audits.
- Advised on the formation of several tax-exempt organizations, including public charities, private foundations and supporting organizations.

RECOGNITIONS

- AV Peer Review rating, Martindale-Hubbell

IN THE COMMUNITY

Richard is active with the Adoption Center of Illinois both before and after the adoption of his two children.

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