

Jonathan Stein

Director

jstein@goulstonstorrs.com

New York: +1 212 878 5183



Jonathan Stein provides sophisticated tax advice across a full range of commercial and real estate transactions.

His clients include REITS, developers, institutional investors, closely-held enterprises, fund sponsors, portfolio companies, and lenders.

He handles complex tax matters involving joint ventures, cross-border and tax-exempt structuring, tax-free exchanges, transfer taxes, leasing, and finance matters.

Jonathan also represents investment fund sponsors and portfolio companies in taxable and tax-free M&A transactions.

Accolades

- New York Metro Super Lawyers, Rising Stars, 2017

Affiliations

- Member, Real Estate Roundtable, Tax Policy Advisory Committee
- Member, Tax Club
- Member, National Association of Real Estate Investment Trusts (Nareit), Federal Tax Subcommittee
- Member, American Bar Association, Section of Taxation, Real Estate Committee

Admissions

- New York
- Massachusetts

Education

- New York University School of Law (LL.M., 2011)
- Stanford Law School (J.D., 2007)
- University of Pennsylvania (M.A., 2004)
- University of Pennsylvania (B.A., *magna cum laude*, 2000)

Representative Matters

Sale of Romanow Container to SupplyOne, Inc.

Represented Romanow Container, a leading independent corrugated and protective packaging supplier, in its sale to SupplyOne, Inc., a portfolio company of Wellspring Capital Management.

Audax Group Acquisition

We represented Audax Group, a leading private equity firm, and its portfolio company AI Fire, LLC, in the sale of the company to Snow Phipps Group, LLC.

AXA IM Alts and its Affiliates in one of the Largest Industrial Portfolio Acquisitions of 2020

Representation of AXA IM Alts and its affiliates in one of the largest industrial portfolio acquisitions of 2020. The portfolio consists of 27 assets in Chicago, Houston, Los Angeles, Central New Jersey, Dallas, South Florida, Southern New Jersey and Atlanta. In a significant step in its strategy to grow a U.S. wide logistics platform, AXA IM Alts, on behalf of clients and through a joint venture with Cabot Properties, Inc., acquired the 7,984,000 s/f portfolio for approximately \$875 million, through a share purchase of a REIT previously managed by Cabot Properties. Representation included all matters related to property diligence, structuring, joint venture, purchase, financing, tax and environmental considerations of the property, including tax and structuring issues relating to cross-border investments.

Tax-Deferred Transaction for \$250M Student Housing Investment

Representation of a real estate sponsor in connection with a tax-deferred transaction with sovereign wealth investor for \$250 million investment in student housing assets.

\$900M Portfolio Acquisition by Private REIT

Representation of European insurer in acquisition of \$900 million portfolio of distribution centers and warehouses structured as a private REIT purchase.

\$300M Investment in U.S. Real Estate Assets by Family Office

Representation of a foreign family office investor in connection with a \$300 million investment in U.S. real estate assets.

Private Equity Fund \$200M Debt Restructure

Representation of private equity fund in restructuring \$200 million of debt for distressed portfolio company.

\$250M Investment into Fund Management Vehicle

Representation of fund sponsor in connection with \$250 million investment into fund management vehicle.

Private Equity Fund Formation

Private equity fund formation for real estate private equity fund focused on workforce and affordable housing assets.

Sale of Manufacturing Company to Financial Buyer

Representation of seller of manufacturing company to financial buyer in an asset sale.

WS Development Tax Structuring Seaport Development

Representation of WS Development in connection with tax structuring for the ongoing development of Boston's Seaport District. The district includes more than 1.1 million square feet of mixed-use retail, office, multifamily, and condominium properties. Also represent WS in connection with joint venture formation and the associated tax structuring.

CrossHarbor Capital Partners Tax Advice

Representation of CrossHarbor Capital Partners in connection with joint ventures, acquisitions, dispositions, tax credits, and tax structuring matters related to their commercial real estate investments. Work with the client and their investors on a range of tax needs both within the U.S. and overseas.

Sale of \$135M Office Property

Representation of the private owners of a media company in connection with the sale of a \$135M office property in Washington D.C. to a REIT in a tax-deferred transaction.

Publicly-Traded Telecommunications Company

Representation of a publicly-trade telecommunications company providing communications and payment services around the world, providing counsel to the client in connection with tax-free spring-offs of corporate divestitures and dispositions within the United States and internationally.

Tax-Free 1031 Exchanges and Other Tax-Deferred Transactions

Representation of the buyers and sellers of real estate properties in negotiation of a variety of tax-free 1031 exchanges and other tax-deferred transactions.