

Jonathan Stein

Director

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

His real estate clients include REITS, developers, institutional and family office investors, fund sponsors 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

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

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.

Publications

October 5, 2020

New York State is Considering a (New) Tax That Would Apply to Mezzanine Loans and Preferred Equity

June 4, 2020

PPP Update - Paycheck Protection Flexibility Act

May 1, 2020

PPP – Additional Cautionary Guidance, Impact of Forgiveness on Deductible Expenses, and New Loan Amount Limits for Corporate Groups

April 24, 2020

New PPP Loan Availability and Cautionary Guidance Announced

April 6, 2020

SBA PPP Loan Applications for Hotels

October 29, 2019

**Centralized Audit Regime Issues for Buyers and Sellers of Partnership Interests:
Protecting Against Audit Risks**

Strafford Publications

Summer 2018

REIT Issues for Retail Leasing Professionals

ICSC: International Council of Shopping Centers

Spring 2019

Senate Proposal Would End Deferral for Carried Interest

March 1, 2019

Audit Regime's Modification Options Also Have Consequences

Tax Notes

November 30, 2018

Private Equity and Venture Capital: A Roundtable Discussion

Lawyers Weekly

November 2018

Private Equity and Venture Capital: A Roundtable Discussion

Massachusetts Lawyers Weekly

August 27, 2018

Trends in M&A Provisions: After-Tax Indemnity Limitations

Bloomberg Law

August 20, 2018

Some Foreign Partners Are in a Tight Spot Under Audit Rep Rules

Tax Notes Today

August 16, 2018

**New IRS Partnership Audit Rules for Tax Counsel: Massive Changes to Partnership
Operations and Governance (Webinar)**

Strafford (CLE/CPE)

January 2018

Tax Reform Advisory: Provisions Impacting Debt Financing

December 2017

Tax Reform Advisory: Corporate and General Business Provisions

December 2017

Tax Reform Advisory: Real Estate Industry