Business Tax Planning

Tax planning is a cornerstone of strategic success in the business sector. We assist clients in structuring transactions, operations, and investments to optimize tax efficiency and achieve their business objectives. This includes advising on entity formation and the most tax-advantageous structures for new ventures, tax-efficient strategies for both buyers and sellers in mergers and acquisitions, optimizing the tax implications of real estate transactions, designing executive compensation plans that are both competitive and tax-advantaged, and succession planning for business transitions and generational wealth transfer. Our deep expertise encompasses a broad range of federal tax issues, including intricate matters related to corporate income tax, partnership tax, S corporation tax, and tax-exempt organizations.

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Experience

Representative Matters

- Advising the sole shareholder of a real estate title company in a $3+ million sale to a major New Jersey brokerage firm, navigating earn-out, tax, and personal planning issues.
- Representing a family-owned industrial production and supply chain company and affiliated trusts and estate in connection with a proposed $32 million sale and leaseback of a 160,000 square foot warehouse, construction of a 90,000 square foot flex facility, zoning and land use approvals, ISRA compliance, tax planning, and corporate reorganizations.
- Represented the sole shareholder of a transportation and logistics company in its $92.5 million sale to private equity, including an F-reorganization and rollover equity structure to achieve tax-efficient liquidity.
- Represented a New Jersey commercial lender in a complex financing restructuring involving the New Jersey Economic Development Authority and the IRS, addressing industrial revenue bond compliance issues.
- Represented the seller of a leading barware and wine accessories company in a $69.5 million asset sale, optimizing tax and transaction structure.
- Represented a bulk food ingredient supplier in a $15 million asset sale, including lease negotiations, earn-out provisions, and a complex tax-driven F reorganization.
- Represented a fast-growing, multi-million-dollar international e-cigarette liquid manufacturer and distributor in connection with operating agreements, employment matters, and tax planning.
- Represented the seller of a regional commercial baking equipment distributor and service provider in a $7.5 million equity sale with post-closing earn-out, retained equity, recapitalization, and related tax planning.
- Advised a corporation formed to hold rollover equity in a multi-stage sale of a business exceeding $400 million, resolving tax and structural issues arising from unequal rollover participation among former shareholders.
- Advised a public company in conducting a comprehensive internal review of outstanding stock options and warrants to confirm compliance with securities, tax, and payroll regulations.

Insights & More

Announcements

Greenbaum, Rowe, Smith & Davis LLP Shares Timely Insights in New Blog on Legal Issues for the Healthcare Industry
7.13.22

Client Alerts

One Big Beautiful Bill Act: An Overview of Impacts on the Tax Code for Business Owners
8.07.25

Seminars & Events

Counseling Cannabis: Legal Essentials and Opportunities
6.11.24