



William M. Joseph (Bill)

Title: Member

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Bill Joseph is a member of the firm's Business and Finance Practice Group. Bill focuses his practice on transactional tax matters, counseling clients on domestic and international corporate mergers and acquisitions, partnerships, and joint ventures. He also regularly represents clients before the Internal Revenue Service and state departments of revenue. Industries in which Bill has represented clients include airlines, telecommunications, food manufacturers, insurance, banking and financial services, health care, technology, commercial and residential real estate development and venture capital.

CAPABILITIES

Practice Areas

- Business Services
- Charitable & Non-Profit Organizations
- Corporate Finance & Securities Offerings
- Corporate General Services
- Corporate Governance & Disclosure
- Health Care - Business Transactions & Finance
- Joint Ventures
- Mergers & Acquisitions
- Real Estate
- Real Estate Development & Finance
- State & Local Tax Litigation
- Taxation

RECENT ASSIGNMENTS

- Obtained a revenue ruling from the IRS designating a U.K. commodities exchange as a "qualified board or exchange" under IRC Sec. 1256(g)(7)(C), the first such ruling issued in more than 20 years.
- Represented U.K. group in investments in insurance businesses in the U.S.
- Responsible for tax planning, tax disclosure and tax opinions in connection with the sale of a credit card processing company to a major bank for \$2.1 billion.
- Responsible for tax issues, negotiation and documentation of the sale of a privately held food products company to a Dutch public company for more than \$300 million.
- Provided tax counsel to a paper manufacturing company in connection with its tax-free spinoff from a large consumer products company.
- Drafted partnership agreements and tax disclosures for a \$175 million private equity fund investing in medical device businesses.
- Structured a \$300 million real estate joint venture between U.S. persons and Canadian pension funds.
- Provided tax guidance in connection with a 300 MW solar power facility in New Mexico.
- Was principally responsible for analyzing and obtaining Georgia tax incentives for a large consumer foods company opening new facilities in the state and prepared a management presentation to its Chief Executive Officer.
- Worked on all aspects of the sale of a for-profit nursing home group to a 501(c)(3) organization and obtained a ruling from the IRS on novel issues in connection with the use of tax-exempt financing in the transaction.

BAR ADMISSIONS

- Georgia
- Massachusetts
- New York
- U.S. Tax Court

RECENT NEWS, ARTICLES & SPEAKING ENGAGEMENTS

- U.S. Income Taxation and Withholding on Sales of Partnership Interests by Non-U.S. Partners
Atlanta International Tax Study Group Virtual Meeting, February 23, 2021
- The New Stimulus Package and the Next Round of Paycheck Protection Program Loans *with*
Brian A. Cromer , *Luke F. Ervin* , and *Alison M. Zeitlin* Stites & Harbison Client Alert, January
12, 2021
- FourBridges Completes Acquisition Of Color Burst Landscapes
by Staff Writer, *The Chattanooga.com*, December 17, 2020
- WEBINAR: COVID-19 and Your Business — What You Need to Know *with* *Brian A. Cromer* and
Shannon Antle Hamilton presented by Stites & Harbison, PLLC, April 7, 2020
- Tax Provisions of the CARES Act – What You Need to Know Stites & Harbison Client Alert,
March 27, 2020
- Information You Need on the COVID-19 Coronavirus *Stites & Harbison, PLLC* March 2020
- Ex-Schulten Ward Tax Partner Joins Stites & Harbison
by Derek Major, *Law 360.com*, April 25, 2019
- Proposed Border Adjustment Tax
Atlanta International Tax Study Group, April 2017
- Taxation of Dividend Equivalent Payments under IRC Sec. 871(m) and New Proposed
Regulations
Atlanta International Tax Study Group, 2014

- An Overview of Proposed FATCA (Chapter 4) Regulations
Atlanta International Tax Study Group, 2012
- Law Firm Partnership Agreements
Atlanta Bar Association Managing Partner Committee, 2012
- Tax Issues in Acquisitions of Distressed Debt
Client Lunch & Learn, January 2012
- Foreign Investment in U.S. Real Property Through Real Estate Investment Trusts
Atlanta International Tax Study Group, 2008
- Acquisitions of Troubled Companies
Joint Program with Houlihan Lokey Howard & Zukin, 2002
- Mergers & Acquisitions for Middle Market
Fulcrum Information Services Business & Tax Seminar, 2002
- Valuation
Fulcrum Information Services Business & Tax Seminar, 2001

MEMBERSHIPS

- American Bar Association
- Atlanta International Tax Study Group

EDUCATION

Boston University School of Law J.D. *cum laude* 1984

- *Boston University International Law Journal*, Staff Editor

- Edward F. Hennessey Distinguished Scholar

- G. Joseph Tauro Scholar

- American Jurisprudence Award for Corporations

Boston University School of Law LL.M., Taxation 1989

University of Pennsylvania, Wharton School B.S., Economics *cum laude* Concentrations in Accounting and Political Science 1981

MORE THAN STITES & HARBISON

Bill lives in Sandy Springs, Georgia with his wife, Helene and their Shetland Sheepdog, Cooper. Although Bill is a New York native and started his legal practice with a large firm in Boston, Massachusetts, Bill is an avid Atlanta sports fan, having raised his family in Atlanta. Since moving to Atlanta, Bill has been an active University of Pennsylvania alumnus, interviewing high school students applying to Penn. For many years, Bill spent most of his free time following his three sons' exploits in baseball from youth baseball to college. Now that their baseball careers are over, he is looking for new hobbies (tennis and hiking being current contenders).

ACCOLADES

- *Martindale-Hubbell*® AV-Preeminent® Peer Review Rated
- *Best Lawyers in America*®, Tax Law (2021-23)
- *Georgia Trend Magazine* Legal Elite (2012, 2014, 2016-21)
- *Georgia Super Lawyers*® (2019-22)