STITES & HARBISON PLLC



Herbert B. Wolf Jr. (Bert)

Title: Member

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Bert Wolf is a tax lawyer, and a member of the firm's Business Services and Trusts & Estate Groups. He assists individuals and organizations at every stage of business, from formation and raising capital to tax structure and operations planning, and the development of all types of growth strategies – including acquisitions, mergers, and reorganizations. He regularly consults with clients concerning succession planning, wills, trusts and estate planning, buy/sell agreements, risk assessment and planning, regulatory matters, employment agreements, non-compete agreements, and the tax structure of real estate transactions and aircraft transactions.

Bert also helps clients with local, state and federal tax disputes as well as with tax and corporate planning including negotiations with tax officials, obtaining tax rulings and representing clients in tax audit and litigation matters.

Bert has extensive experience in the health care industry and providing tax advice related to formation and operation of charities and other "non-profit" entities. He regularly assists doctors, hospitals, and teaching institutions in developing joint ventures; with tax advice; in fraud and abuse investigations; with regulatory and compliance issues; and in end-of-life planning advisory services.

CAPABILITIES

Practice Areas

- Business Services
- State & Local Tax Litigation
- Taxation
- Trusts & Estates and Family Law

- Trusts & Estates
- Corporate General Services
- Corporate Governance & Disclosure
- Business Expansions, Relocations & Government Incentive Programs
- Contract Drafting, Negotiation for Public & Private Projects
- Mergers & Acquisitions
- Banking & Finance
- Corporate Finance & Securities Offerings
- Joint Ventures
- Health Care
- Health Care – Bankruptcy & Restructuring
- Health Care – Business Transactions & Finance
- Airport Law
- Aviation
- Charitable & Non-Profit Organizations

BAR ADMISSIONS

- Tennessee
- U.S. District Court for the Western District of Tennessee
- U.S. Tax Court

RECENT NEWS, ARTICLES & SPEAKING ENGAGEMENTS

- People on the Move: Herbert B. (Bert) Wolf Jr.
  by Editor, *Memphis Business Journal*, August 20, 2024
- Tax Reform and Sole Proprietorships, Partnerships and S Corporations
  ,*with Andrew R. Jacobs* Stites & Harbison Client Alert, January 3, 2018

FIRM LEADERSHIP

- Office Executive Member, Memphis, TN office
- Opinions Committee, Member
- Lateral Recruiting Committee, former Member

MEMBERSHIPS

- American Bar Association,
  - Taxation Section
- American Institute of Certified Public Accountants
- Memphis Bar Association
- Tennessee Bar Association

EDUCATION

- New York University LL.M., Taxation, 1984
- University of Memphis Cecil C. Humphreys School of Law J.D., 1982
- University of Memphis B.B.A., 1977

BEFORE STITES & HARBISON

Prior to joining the firm, Bert was a partner with Husch Blackwell LLP in Memphis where he practiced business and health care law.

MORE THAN STITES & HARBISON

Bert is an active member of the Memphis community. He is a former director (2006-12 and 2013-14) of the Memphis Jewish Family Service. He is also a former director (2013) and member of the Executive Committee (2014-15) of the Memphis Jewish Foundation as well as a director (2006-15) for Memphis Jewish Home and Rehab. Bert was active with United Way of the Mid-South from 1992-2014, serving as general counsel, executive committee member and board member, and the Memphis Jewish Community Center from 1987-2010, also serving variously as general counsel, executive committee member and board member. Bert is an inactive Certified Public Accountant (1979).

ACCOLADES

- *Best Lawyers in America*®, Closely Held Companies and Family Businesses Law; Corporate Law; Tax Law (2003-27)
- Memphis Tax Law "Lawyer of the Year," 2012