



Jacob Stephens

ASSOCIATE

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OVERVIEW

With a knack for problem solving, Jacob helps clients resolve tax questions.

Jacob first discovered his interest in law as a business school student: his business law courses felt like solving puzzles, and he realized this was his calling. He quickly learned that he was especially drawn to tax law because of the complex set of rules that made this work challenging and detailed.

Today, Jacob assists clients with analysis of mergers, acquisitions and other corporate transactions, as well as the tax considerations of various financing structures. Many of his projects involve cooperative taxation, cooperative joint ventures, and the tax implications of transactions involving these entities. Jacob also provides counsel on the implementation of tax credit and other incentives opportunities and assists with state and local taxation questions.

Known as a thoughtful professional who endeavors to thoroughly understand each component of a client's situation, Jacob is driven by client goals. He focuses from the beginning on what the client truly desires and crafts solutions that align with the client's overall business aims.

Industry

Energy & Natural Resources

Services

Development Incentives & Tax Credits

Federal Tax Planning

Nonprofit Organizations & Religious Institutions

State & Local Taxation (SaLT)

Tax

Tax Controversy

Experience

- Conducts tax exposure analyses prior to mergers and acquisitions.
- Advises clients during negotiation and implementation of tax credit and incentive opportunities across the country.
- Provides counsel on SALT questions, including consulting projects involving proper entity classification and Voluntary Disclosure Agreements.
- Analyzed legal arguments, drafted memoranda and recommended case ruling in real property tax exemption dispute in the Superior Court of the District of Columbia.

Education

- J.D., Washington University in St. Louis School of Law
 - *cum laude*
 - *Washington University Jurisprudence Review*, Notes Editor
- B.S., Tulane University
 - *magna cum laude*
 - Legal Studies in Business

Admissions

- Missouri
- California



2024 Pro Bono Champion