



Contact

Jean M. Bertrand

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Jean Bertrand is a Senior Counsel in the Tax Department and a member of the Private Funds Group. Jean advises clients on a broad range of domestic and international tax issues. Her practice focuses on hedge and private equity fund formation, investment structuring, cross-border lending transactions and other financings, and providing general tax advice to corporations, partnerships, high-net-worth individuals and families. In addition, Jean has significant experience in advising public charities, private foundations and other tax-exempt organizations on structural and operating matters, including obtaining tax-exempt status, managing unrelated business taxable income, complying with the excess benefit transaction rules, grant-making, fundraising, and structuring investments.

Prior to becoming a lawyer, Jean was registered as a certified public accountant in New York and worked for several years as an auditor at a major public accounting firm. Prior to joining the Firm, Jean was a Special Counsel at Cadwalader, Wickersham and Taft LLP.

Practices

Tax, Investment Management, Private Funds

Industries

Private Equity, Asset Management

Education

State University of New York College at Geneseo, B.S.

University of Pennsylvania Law School, J.D.

New York University School of Law, LL.M.

Admissions & Qualifications

New York