

Contact

## Jean M. Bertrand

**Partner**

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Jean Bertrand is a partner in the Tax Department and a member of the Private Funds Group. Jean counsels clients on a wide range of domestic and international tax matters. Her practice focuses on advising private investment funds, including credit funds, real estate funds, public and private REITs, hedge funds, and private equity funds on all aspects of their operations, including fund formation, tax planning, investment structuring, and day-to-day operations. She regularly represents U.S. and non-U.S. investors (including governmental entities), on structuring their investment into private investment funds and real estate ventures (including REITs). Jean also advises clients with respect to strategic transactions, including partnerships and other joint ventures, M&A, derivatives, cross-border lending transactions and other financings, and provides 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 managing unrelated business taxable income, complying with exemption requirements and structuring investments.

### Practices

Tax, Investment Management, Private Funds

### Industries

Asset Management, Private Capital, Private Equity, Real Assets

## Education

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

University of Pennsylvania Carey Law School, J.D.

New York University School of Law, LL.M.

## Admissions & Qualifications

New York