



Jodi J. Schwartz

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Jodi J. Schwartz focuses on the tax aspects of corporate transactions, including mergers and acquisitions, joint ventures, spin-offs and financial instruments. Ms. Schwartz has been the principal tax lawyer on numerous domestic and cross-border transactions in a wide range of industries. She was elected partner in 1990.

Ms. Schwartz received her B.S. in Economics *magna cum laude* from the University of Pennsylvania in 1981, her M.B.A. from the University of Pennsylvania (Wharton School) in 1984, her J.D. *magna cum laude* from the University of Pennsylvania Law School in 1984 and her LL.M. in taxation from the New York University Law School in 1987.

Ms. Schwartz is recognized as one of the world's leading lawyers in the field of taxation, including being selected by [Chambers Global Guide to the World's Leading Lawyers](#), [Chambers USA Guide to America's Leading Lawyers for Business](#), [International Who's Who of Business Lawyers](#) and as a tax expert by [Euromoney Institutional Investor Expert Guides](#). In addition, she is a member of the Executive Committee and past chair of the Tax Section of the New York State Bar Association and also is a member of the American College of Tax Counsel.

Ms. Schwartz serves as an officer of the UJA-Federation of NY, serves as a member of the Executive Committee and boards of the Jewish Federations of North America, Penn Hillel, The Jewish Board,

American Jewish Joint Distribution Committee, and The Steep Rock Association and serves on the Board of Overseers of the University of Pennsylvania Law School and the boards of The Browning School and The Gateway School.

Recent Publications

[Cross-Border M&A - 2023 Checklist for Successful Acquisitions in the United States](#), in Harvard Law School Forum on Corporate Governance, January 7, 2023.

[Book Minimum Tax and M&A](#), in Columbia Law School's Blog on Corporations and the Capital Markets, September 1, 2022.

[The Corporate Tax Planning Review](#), co-editor and co-author of U.S. chapter, Law Business Research, London, Fourth ed. 2022 (Third ed. 2021; Second ed. 2020; First ed. 2019).

[Private Equity - 2021 Year in Review and 2022 Outlook](#), in Harvard Law School Forum on Corporate Governance, February 9, 2022.

[Cross-Border M&A - 2022 Checklist for Successful Acquisitions in the United States](#), in Harvard Law School Forum on Corporate Governance and Financial Regulation, January 22, 2022.

[REIT M&A and Strategy in 2022](#), January 3, 2022.

[Private Equity - Year in Review and 2021 Outlook](#), in Harvard Law School Forum on Corporate Governance, February 6, 2021.

[REITs in 2021](#), January 11, 2021; also available at [Harvard Law School Forum on Corporate Governance](#).

["New" IRS Guidance Provides Relief from Dividend Payment Requirement for REITs](#), May 6, 2020.

[REIT M&A and Activism: Preparing for Threats in the Covid-19 Environment](#), April 6, 2020.

[Private Equity - Year in Review and 2020 Outlook](#), in Harvard Law School Forum on Corporate Governance and Financial Regulation, February 8, 2020.

[REIT M&A in 2020](#), January 6, 2020.

[Cross Border M&A - 2019 Checklist for Successful Acquisitions in the United States](#), in Harvard Law School Forum on Corporate Governance and Financial Regulation, January 30, 2019.

[2018 Private Equity Year In Review](#), in Harvard Law School Forum on Corporate Governance and Financial Regulation, January 17, 2019.

[REIT M&A in a Complex Market](#), in Harvard Law School Forum on Corporate Governance and Financial Regulation, June 23, 2018.