



Jared D. Mobley

Managing Partner, Charlotte Office

Charlotte
+1.704.331.7535

jared.mobley@klgates.com

OVERVIEW

Jared Mobley is a partner in the Charlotte office and focuses his practice on complex aspects of U.S. federal, state and local taxation, including creating and implementing tax-efficient structures for the firm's clients. His practice covers many facets of tax law that are intertwined with the business activities of the firm's clients, including: advising clients on the tax aspects of private equity, mezzanine capital, and M&A transactions as well as joint ventures and financial product transactions; creating, implementing and analyzing executive compensation arrangements; advising litigators and litigation clients on the tax aspects of lawsuit settlements and judgments; and assisting nonprofit entities in respect of organizational and operational matters. In addition, he works in conjunction with the estate planning and trusts & estates group on tax matters relating to family offices, family businesses, and estate planning and estate administration. Jared frequently advises clients on the tax and business aspects of LLCs, "S" corporations and other flow-through entities.

ACHIEVEMENTS

- Fellow, American College of Tax Counsel
- *Best Lawyers in America*, Tax Law, 2010 – 2022
- Named to the BTI Consulting Group M&A Client Service All-Stars list in 2021

PROFESSIONAL / CIVIC ACTIVITIES

- American Bar Association (Tax Section)
- North Carolina Bar Association (Tax Section Council, 2003-2013; Chair, 2012-2013)
- South Carolina Bar Association (Tax Section)
- Association for Corporate Growth – Charlotte Chapter (President, 2010-2011)

SPEAKING ENGAGEMENTS

- “Tax Reform Considerations for Private Equity,” Panelist along with representatives from PNC Business Credit, Pamlico Capital, and Dixon Hughes Goodman, ACG Charlotte Deal Crawl Conference, September 2018
- “Private Equity Trends & Strategies after the 2017 Tax Act,” Joint Event with K&L Gates, U.S. Trust, Bank of America Merrill Lynch, and Marsh & McLennan, November 2018
- “Recent & Developing Tax Trends in U.S. M&A Transactions,” Tax Executives Institute - New Jersey Chapter, November 2018

EDUCATION

- LL.M., New York University School of Law, 1999 (*Taxation*)
- J.D., University of South Carolina School of Law, 1998 (*Arthur B. Custy Tax Award recipient*)
- B.S., University of South Carolina, 1995 (*magna cum laude, Phi Beta Kappa*)

ADMISSIONS

- Bar of North Carolina
- Bar of South Carolina

THOUGHT LEADERSHIP POWERED BY HUB

- 30 October 2020, Retirement Security Offers a Ray of Sunshine for Bipartisanship, Though the Outlook for Social Security Reform Seems Cloudier (*Alerts/Updates*)
- 19 October 2020, Eye on the Election: Potential Impact on Tax Incentives for Power and Related Industries (*Alerts/Updates*)
- 9 October 2020, 2021 U.S. Tax Forecast: How the November Elections Could Lead to Significant Tax Changes Affecting You and Your Business (*Alerts/Updates*)

OTHER PUBLICATIONS

- “An Overview: The Taxation of Settlements and Judgments,” *South Carolina Damages*, South Carolina Bar (2nd edition, 2009) and (Supplement, 2017)

NEWS & EVENTS

- 19 August 2021, Nearly 300 K&L Gates Lawyers Named Among 2022 Best Lawyers in America, Ones to Watch (*Rankings & Recognitions*)

- 4 December 2020, K&L Gates Again Advises Red Ventures on Pending Sale of CNET Content Services to 1WorldSync (*Noteworthy Work*)
- 18 September 2020, K&L Gates Advises Red Ventures on USD \$500 Million Acquisition of CNET Media Group from ViacomCBS (*Noteworthy Work*)
- 31 March 2020, K&L Gates Welcomes Tax Partner in Charlotte Office (*Press Release*)
- 3 September 2019, K&L Gates Advises Sealed Air Corporation on US\$510 Million Acquisition of Automated Packaging Systems (*Press Release*)
- 6 October 2017, K&L Gates Advises Ridgmont Equity Partners on Acquisition of Tech-Enabled Medical Products Distributor (*Noteworthy Work*)
- 13 February 2017, K&L Gates Advises Hexagon AB on Pending Acquisition of MSC Software Corporation (*Noteworthy Work, Press Release*)

AREAS OF FOCUS

- Corporate Tax
- Benefits and ESOPs
- Estate Planning and Trusts & Estates
- Executive Compensation
- Health Care and FDA

EMERGING ISSUES

- Opportunity Zones (OZs)

REPRESENTATIVE EXPERIENCE

Transactional

- Served as Tax counsel for Charlotte-based, private equity firm Carousel Capital on its sale of Caldwell & Gregory, a leading provider of turnkey laundry facility management services for customers in the university and multi-family housing market, to Incline Equity Partners
- Served as Tax counsel for Charlotte-based, private equity firm Carousel Capital on its acquisition, ownership and ultimate recapitalization of Transflo, a leading mobile, telematics, and business process automation provider to the transportation industry, to True Wind Capital Management
- Served as Tax counsel for Charlotte-based, private equity firm Carousel Capital in its leveraged acquisition of Huseby, Inc., a leading court reporting agency in the United States

- Served as Tax counsel for Charlotte-based, private equity firm Carousel Capital in its acquisition, ownership and ultimate sale of Express Oil, one of the largest independent automotive platforms in the United States, to Golden Gate Capital
- Served as Tax counsel for Charlotte-based private equity firm Ridgemont Equity Partners in its leveraged acquisition of Allied 100 Group, Inc., a distributor of automated external defibrillators (AEDs) and ancillary parts and accessories, as well as a proprietary, SaaS-based medical direction software solution, from Thompson Street Capital Partners
- Served as Tax counsel for Charlotte-based private equity firm Ridgemont Equity Partners in its acquisition, ownership and ultimate sale of Cook & Boardman, a leading specialty distributor of commercial door entry solutions, to Littlejohn & Co.
- Served as Tax counsel for Charlotte-based private equity firm Ridgemont Equity Partners in its acquisition, ownership and ultimate sale of Transportation Insight, a transportation management and logistics software firm, to Gryphon Investors
- Served as Tax counsel for CapitalSouth Growth Fund and related funds, in numerous mezzanine debt and equity investments and exit transactions
- Served as Tax counsel for Red Ventures, a leading digital marketing services company, in numerous strategic investments and acquisition transactions
- Served as Tax counsel for Hexagon AB, a measurement technologies company headquartered in Sweden, in multiple acquisitions, including its acquisition of Intergraph Corporation, a leading software and engineering company
- Served as Tax counsel for Laborie Medical Technologies, Inc., a global manufacturer and developer of medical technology owned by Patricia Industries, a part of Investor AB, on the acquisition of Cogentix Medical, Inc. (Nasdaq CM: CGNT), a global medical device company
- Served as Tax counsel for LKQ Corporation (Nasdaq: LKQ), a distributor of aftermarket and recycled automotive parts, in its sale of the automotive original equipment manufacturer glass business to Vitro S.A.B. de C.V. and related carve-out of the retained aftermarket glass distribution business
- Served as Tax counsel for LKQ Corporation (Nasdaq: LKQ), a distributor of aftermarket and recycled automotive parts in its acquisition of Pittsburgh Glass Works LLC from Kohlberg & Co. LLC.
- Served as Tax counsel for LKQ Corporation (Nasdaq: LKQ), a distributor of aftermarket and recycled automotive parts its acquisition of the aftermarket business of Warn Industries from Dover Corporation

Non-Transactional

- Assisted clients with family office and succession planning and estate administration matters, including creation of family succession and trustee plans, creation of will, trust and power of attorney documents, formation of family LLCs, and client representation in estate tax audits
- Assisted clients in North Carolina tax planning and compliance and in controversies with the North Carolina Department of Revenue, as well as real and business personal property tax matters

- Assisted litigation clients in negotiating and drafting tax aspects of employment and other litigation settlements
- Assisted clients in all aspects of federal tax credit and North Carolina and South Carolina state tax credit transactions, including historic tax credits and renewable energy tax credits
- Assisted clients in forming 501(c)(3) charitable organizations and on-going compliance