

Jared D. Mobley

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OVERVIEW

Jared Mobley is a partner in the firm's Corporate practice. His practice focuses on complex aspects of US 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; assisting families and other clients with intergenerational business and wealth planning and transfers; 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. He works on intergenerational planning and tax matters for various family offices and family businesses. Jared frequently advises clients on the tax and business aspects of LLCs, “S” corporations, and other flow-through entities.

ACHIEVEMENTS

- Recognized by *The Legal 500 United States* as a Recommended Lawyer for US taxes: non-contentious, 2024
- Fellow, American College of Tax Counsel
- Recognized in *The Best Lawyers in America*® for Tax Law, 2010-2024
- 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)

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

OTHER PUBLICATIONS

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

NEWS & EVENTS

- 20 August 2026, Nearly 300 K&L Gates Lawyers Recognized Among 2027 Best Lawyers in America, Ones to Watch
- 6 July 2026, K&L Gates Welcomes Real Estate Finance Partner in Charleston
- 7 November 2025, K&L Gates Advises Carousel Capital on Recapitalization of CraneWorks
- 24 July 2025, K&L Gates Assists Carousel Capital on Sale of Majority Interest in Landscape Workshop to Ares Management Corporation
- 18 September 2023, K&L Gates Advises Foro Holdings, Inc., on Acquisition of Citi's Bridge Platform and Related Capital Investment
- 12 July 2023, K&L Gates Bolsters Intellectual Property Practice With Addition of Charlotte Partner and Multi-Office Team
- 18 August 2022, More Than 350 K&L Gates Lawyers Named Among 2023 Best Lawyers in America, Ones to Watch
- 19 August 2021, Nearly 300 K&L Gates Lawyers Named Among 2022 Best Lawyers in America, Ones to Watch
- 4 December 2020, K&L Gates Again Advises Red Ventures on Pending Sale of CNET Content Services to 1WorldSync
- 18 September 2020, K&L Gates Advises Red Ventures on USD $500 Million Acquisition of CNET Media Group From ViacomCBS

AREAS OF FOCUS

- Tax
- Benefits and ESOPs
- Estate Planning and Trusts & Estates
- Executive Compensation
- Private Equity Transactions

INDUSTRIES

- Healthcare
- Transportation and Logistics

REPRESENTATIVE EXPERIENCE

- 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 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 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
- 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 clients in forming 501(c)(3) charitable organizations and on-going compliance
- 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 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 Red Ventures, a leading digital marketing services company, in numerous strategic investments and acquisition transactions
- 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
- 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
- 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