ALSTON & BIRD

Jacob L. Kaplan

Partner

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Related Services

Exempt Organizations ▪ Federal & International Tax ▪ Tax ▪ Wealth Planning ▪ Government & Economic Incentives ▪ Corporate Health Care Transactions ▪ Health Care ▪ Family Office ▪ Blockchain & Digital Assets ▪ Tax Credit Transactions

Jake develops tax minimization strategies for families and tax-exempt organizations. Individuals come to Jake for estate and tax planning, while organizations seek Jake's counsel on tax, governance, regulatory, and New Markets Tax Credit issues.

Jake Kaplan is a partner with Alston & Bird's Federal & International Tax Group and co-leads the firm's Tax Credit Transactions Team. He focuses his practice in the areas of estate planning, exempt organizations, and New Markets Tax Credit (NMTC) financings. Jake draws on his rich and varied experiences to benefit a diverse group of clients whose needs often overlap across Jake's areas of expertise. He advises individuals, families, and fiduciaries on tax issues, estate planning strategies, philanthropic plans, and estate administration procedures and best practices. Jake counsels organizations on myriad specialized tax, governance, formation, and operational issues. As co-leader of Alston & Bird's Tax Credit Transactions Team, he also represents hospitals, schools, other organizations, and community development entities in federal NMTC financings that help organizations fund important real estate redevelopment projects and working capital needs.

Jake is recognized as "One to Watch" by *The Best Lawyers in America*® for Trusts & Estates Law and "Up and Coming" by *Chambers High Net Worth* in Private Wealth Law.

Jake earned his J.D. and M.B.A., with high honors, from Emory University, where he was elected to the Order of the Coif.

Representative Experience

- Designed and implemented tax-advantageous estate planning, wealth transfer, and charitable planning strategies for a variety of domestic and international clients.
- Counseled fiduciaries on intricate tax, probate, estate, and trust administration matters.
- Advised tax-exempt public charities and private foundations on a range of issues, including corporate formation and governance, obtaining and maintaining tax-exempt status, compliance with federal tax reporting and charitable solicitation registration requirements, and responding to IRS audits.
- Represented hospitals, schools, other non-profit organizations (QALICBs), and community development entities (CDEs) in federal New Markets Tax Credit (NMTC) financings for real estate redevelopment and working capital projects.

Publications & Presentations

Publications

- "Insight: Transfer Tax and Estate Planning Considerations for Clients with Cryptoassets (Part 2)," *Bloomberg Tax,* January 22, 2020.
- "Insight: Transfer Tax and Estate Planning Considerations for Clients with Cryptoassets (Part 1)," *Bloomberg Tax,* January 21, 2020.

Presentations

- "Stiff Winds, New Currents and Rough Seas – Our Popular Roundtable Discussion on Hot Topics, Changes, and Matters That Will Stay Forever," 29th Annual International Private Client Tax Conference, International Bar Association, London, March 3–5, 2024.
- "Asset Protection and Financial Risk Mitigation," 2023 ApolloMD Leadership Conference, Atlanta, GA, September 13–15, 2023.
- "Recruiting, Retaining, and Developing the Next Generation of Private Client Lawyers," IBA's Private Clients Conference, London, March 7, 2023.
- "Crazy Crypto but Careful Counsel," International Bar Association Private Client Conference, London, June 12-14, 2022.
- "Case Studies: Learning from Others' Experience," Novogradac 2022 New Markets Tax Credit Conference, San Diego, CA, January 20-21, 2022.
- "Federal Tax Law Update," Estate Planning Council of North Georgia March 2021 Meeting, webinar, March 23, 2021.
- "Tax Law Primer for Nonprofit Legal Counsel," State Bar of Georgia Nonprofit Law Section CLE Series, webinar, March 11, 2021.
- "Keeping It Current – Key Developments in Your Jurisdiction," 26th International Private Client Virtual Conference, webinar, March 1-3, 2021.
- "Transactions, Taxes, and Trust and Estate Planning," 2020 Business Services Round Table, webinar, November 19, 2020.
- "COVID-19: The New Normal in Taxes and Private Wealth," International Bar Association, webinar, September 17, 2020.
- "I'm a Beneficiary, Get Me Out of Here!" 25th International Private Client Conference, London, March 1–3, 2020.
- "What a Private Wealth Professional Should Know About Cryptocurrency," Society of Trust and Estate Practitioners (STEP), Washington, D.C., December 5, 2019.
- "New Assets, New Planning: Personal Tax and Estate Planning for a Blockchain World, Including Cryptocurrency and Other Crypto Assets," IBA 2019, Seoul, September 22–27, 2019.

Professional & Community Engagement

- Novogradac & Company, New Markets Tax Credits (NMTC) Working Group
- International Bar Association, Private Client Tax Committee
- Atlanta Bar Association, Estate Planning & Probate Section, vice chair
- State Bar of Georgia, Nonprofit Law Section, past chair; Fiduciary Law Section, Forms Committee
- Cristo Rey Atlanta Jesuit High School, board of visitors
- Charles Loridans Foundation, secretary (2017–2020)
- Georgia Planned Giving Council, director (2016–2022)

- Atlanta Estate Planning Council
- Atlanta Tipoff Club (Naismith Trophy), board of directors

Court Admissions

- U.S. Tax Court

Education

- Emory University (J.D., 2014)
- Emory University (M.B.A., 2014)
- Brandeis University (B.A., 2008)

Admitted to Practice

- Georgia