
Investment Funds: Cross-Practice Advisors

Corporate



John J. Gilluly III

Partner, Austin

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EDUCATION

- J.D., University of Texas
- B.A., Economics and Business Administration, Rhodes College, *cum laude*

REPRESENTATIVE MATTERS

- A private equity firm in the US\$2.4 billion sale of upstream oil and gas assets
- A private equity platform company in its US\$500 million international add-on acquisition
- A private equity firm in its leveraged acquisition of multiple employee benefit firms



Joseph Fore

Partner, Austin

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EDUCATION

- J.D., University of Virginia School of Law, Dean's Scholar
- B.A., Political and Social Thought History, University of Virginia

REPRESENTATIVE MATTERS

- Sovereign wealth fund in its investment in Generate Biomedicines
- Sovereign wealth fund in its investment in McWin Restaurant Fund
- Public pension in its co-investment in Picard



Michael McGuinness

Partner, New York

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EDUCATION

- Ph.D, Harvard University
- J.D., Stanford University
- B.A., University of California, Berkeley, with highest honors

REPRESENTATIVE MATTERS

- Founders and board of directors in formation of, fund-raising with Latin American and SPAC market participants for, and initial public offering of LatAmGrowth SPAC (Nasdaq: LATG), a publicly traded blank check company headquartered in Mexico City and targeting high-growth businesses operating in Latin America
- Founders and board of directors of iAero Group in several capital raising transactions with Blackstone Credit and in related aviation roll-up transactions, including the acquisition of the leading independent US airline charter business Swift Air and two US maintenance and repair operations



Jeff Baglio

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EDUCATION

- J.D., University of Southern California with honors
- B.A., University of California, Santa Barbara, with honors

REPRESENTATIVE MATTERS

- Episode6, a next generation payment solution company, in its US\$48 million Series C financing led by Avenir Capital
- BlackOpal Ventures in its investment in Blaze.tech, an AI powered no code software development company
- Insurance Australia Group in multiple investments in artificial intelligence insurtech company Plnar

Private Equity



Joseph G. Silver

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EDUCATION

- J.D., University of Georgia School of Law, *cum laude*
- B.A., Psychology and Business Administration, Vanderbilt University, with honors

REPRESENTATIVE MATTERS

- MSouth Equity Partners in its acquisitions of GED, Medix Staffing, and Sunbelt Modular
- Accel-KKR in the sales of Cloud 9 Software and Click Dimensions
- Grove Mountain Partners in its acquisitions of Unique Indoor Comfort and Central States Paving



James L. Kelly

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EDUCATION

- J.D., Syracuse University College of Law, *magna cum laude*
- B.A., University of Washington

REPRESENTATIVE MATTERS

- Atlas Holdings in its leveraged acquisition of Foster Farms
- The Carlyle Group and its portfolio company iC Consult Group in its acquisitions of ICSynergy, SecureITSource and Kapstone Technologies
- Oaktree Capital Management, Assured Investment Management and Stellex Capital Management in the sale of PLH Group to Primoris Services Corporation



Harris Eisenberg

Partner, Chicago

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EDUCATION

- J.D., University of Illinois, *magna cum laude*
- B.A., University of Wisconsin-Madison, with distinction

REPRESENTATIVE MATTERS

- Shore Capital Partners in its partnership with Roaming Hunger, a Los Angeles-based software and services platform that partners with food trucks, catering companies, and mobile pop ups
- Shore Capital Partners in the formation of Empower Aesthetics, a new national aesthetics platform headquartered in Austin, Texas
- Shore Capital Partners in its acquisition of Huelman People Solutions

Investment Advisers Act / Investment Company Act



Bradley E. Phipps

Partner, Philadelphia

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EDUCATION

- J.D., Loyola University Chicago School of Law, *magna cum laude*
- B.S., Finance, University of Delaware

REPRESENTATIVE MATTERS

- A US financial institution in connection with the restructuring of a legacy long-short equity fund and the formation of a parallel fund
- A leading real estate fund sponsor in connection with the launch of public markets open-end fund
- A non-US banking institution in connection with private equity fund investing in private companies globally

ISDA and Derivatives



Marc Horwitz

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EDUCATION

- J.D., Indiana University Maurer School of Law
- B.A., Economics, University of Michigan

REPRESENTATIVE MATTERS

- California State Teachers' Retirement System in all aspects of its derivatives and fixed income program
- The State of Connecticut and related investment funds containing state and state pension assets in connection with its ISDA Master Agreements, futures agreements, Master Repurchase Agreements, and custody agreements
- The Washington State Investment Board in connection with its ISDA Master Agreements, Master Securities Forward Transaction Agreements, securities lending agreements and custody agreements

Real Estate



John L. Sullivan

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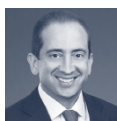
john.sullivan@us.dlapiper.com

EDUCATION

- J.D., Cornell Law School, *cum laude*
- B.A., College of the Holy Cross, *summa cum laude*

REPRESENTATIVE MATTERS

- An institutional global investor in an approximately US\$3.7 billion acquisition of a logistics company with a portfolio of more than 110 operating assets
- An institutional global investor in the acquisition, joint venture, development, financing and sale of an approximately US\$2.1 billion office campus in New York City
- An institutional real estate investment adviser, acting on behalf of various pension plans, in the approximately US\$211 million acquisition of a portfolio of shopping centers, including a related joint venture and financing



Casey Sobhani

Partner, Los Angeles

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EDUCATION

- J.D., Cornell Law School, *cum laude*
- B.A., Pennsylvania State University, Graduated with Distinction

REPRESENTATIVE MATTERS

- A major governmental pension fund for US portfolio of commercial office properties spanning 15 states and millions of square feet
- A major institutional commercial property owner for US portfolio of industrial properties spanning 10 states and millions of square feet
- A major institutional shopping center for US portfolio of retail properties, spanning 6 states and millions of square feet

Tax



Witek Jurewicz

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EDUCATION

- LL.M., Taxation, University of Florida, College of Law
- J.D., University of Florida College of Law
- B.A., Rutgers University

REPRESENTATIVE MATTERS

- Abu Dhabi Investment Authority in its cornerstone commitment to Apollo's newly established Sponsor and Secondary Solutions business, S3, and in its cornerstone commitment to Apollo's its newly established Asset-Backed Finance (ABF) franchise and ATLAS SP Partners
- Formation of a continuation fund for Outfitter Energy Partners and the related tax structuring for the fund's acquisition of several assets from several investment funds
- Numerous US and non-US governmental investors in commingled fund investments of a wide range of asset classes and in special situations transactions



Andrew Kreisberg

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EDUCATION

- J.D., Columbia Law School
- B.A., University of Michigan

REPRESENTATIVE MATTERS

- A sovereign wealth fund in its (a) US\$550 million minority investment in the largest privately held crude operator in the Permian Basin, from an affiliate of a private equity firm; (b) participation in the private offering by a real estate investment trust with office and retail properties in Manhattan and the greater New York metropolitan area; and (c) participation in the US\$110 million Series B financing of a T-cell receptor company building a pipeline of innovative therapeutics for solid tumor patients
- A private equity fund in its purchase of operating assets and its entering into a long-term lease of certain fiber-optic assets, opposite a publicly traded REIT, along with associated restructuring transactions



Drew Young

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EDUCATION

- LL.M., Taxation, New York University
- J.D., New England School of Law
- B.S., Appalachian State University

REPRESENTATIVE MATTERS

- Washington State Investment Board in the restructuring of its fund of one investment in a renewable energy project that qualifies for federal tax credits
- Utah Retirement Systems in structuring and negotiating a separately managed account
- Texas Education Agency in obtaining a Notice from the Treasury Department and Internal Revenue Service modifying the interpretation of certain federal regulations impacting its bond guarantee program for schools

**Eddie Ahn****Partner, Sydney**

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EDUCATION

- Master of Laws, University of Sydney
- Bachelor of Laws, University of New South Wales
- Bachelor of Commerce, Accounting, University of New South Wales

REPRESENTATIVE MATTERS

- Samsung SRA Asset Management in the investment by its Korean institutional investors into a commercial real estate complex in the Sydney CBD
- Heitman in tax and investment structuring for US based investments made by an Australian institutional investor
- The Los Angeles County Employees Retirement Association in investments into Australian agricultural funds

Structured Finance

**Richard J. Reilly, Jr.****Partner, New York**

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EDUCATION

- J.D., Georgetown University Law Center
- B.S., Georgetown University

REPRESENTATIVE MATTERS

- Over twenty years of experience acting as counsel to arrangers, collateral managers and investors on US and European CLOs and other securitizations
- Represents investment advisors on the formation of private investment funds for the purpose of raising capital for investment in structured credit products including, among others, captive and non-captive CLO equity funds

Private Funds Disputes

**Noah Schottenstein****Senior Attorney, Dallas, Houston**

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EDUCATION

- J.D., University of Virginia School of Law
- B.A., The Ohio State University

REPRESENTATIVE MATTERS

- Group of development finance institutions in dispute with manager over fraud/fraudulent misrepresentations against investors
- State teachers' retirement system in dispute over subpoenas and sovereign immunity in connection with third-party lawsuit against manager over portfolio company sale
- Public university investment office in connection with manager removal, fee disputes, fund restructuring, and ESG advisory matters

**Jeremy Andrews****Partner, London**

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EDUCATION

- B.A., Cambridge University, Hons, M.A.

REPRESENTATIVE MATTERS

- An AIM-listed investment fund in LCIA arbitration proceedings claiming fraud against its portfolio manager and in related litigation in Mauritius with the client's joint venture partner
- A U.K. asset manager in relation to contentious and regulatory issues arising from its investment in a Chinese corporate bond issuance, with related proceedings in Hong Kong and PRC
- A sovereign wealth fund on actions against a Cayman islands general partner in light of its failure to recover fund assets lost by reason of third party fraud

Sports Team Acquisitions



Richard Rubano

Partner, New York

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EDUCATION

- J.D., Fordham University School of Law
- B.A., Fordham University, *summa cum laude*

REPRESENTATIVE MATTERS

- Abu Dhabi United Group in connection with its acquisition, together with the New York Yankees, of New York City Football Club, Major League Soccer's 20th expansion club
- An investor in connection with his acquisition of a minority ownership interest in the Brooklyn Nets
- Investors in the purchase of a minority interest in the Oakland Raiders football team



Alexander Steinberg

Partner, New York

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EDUCATION

- J.D., Benjamin N. Cardozo School of Law
- B.B.A., International Business and Sport Management, George Washington University

REPRESENTATIVE MATTERS

- Qatar Investment Authority (QIA) in connection with its minority investment in Monumental Sports & Entertainment
- Ares Management Corporation in a US\$150 million preferred equity investment in Major League Soccer's Inter Miami CF
- Northland Investment Corporation and Larry Gottesdiener in the acquisition of the Atlanta Dream, a WNBA franchise

Regulatory – FCC



Nancy Victory

Partner, Washington, DC

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EDUCATION

- J.D., Georgetown University Law Center, *cum laude*
- A.B., Princeton University with honors

REPRESENTATIVE MATTERS

- Deutsche Telekom and T-Mobile in their acquisition of Sprint
- T-Mobile in its sale of the legacy Sprint global wireline business to Cogent Communications
- T-Mobile in its acquisition of wireless MVNOs Mint Mobile and Ultra Mobile
- Verizon in a complex, multistep restructuring of its US license holdings

Regulatory – CFTC



Deanna R. Reitman

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EDUCATION

- M.B.A., Fordham University
- J.D., St. John's University School of Law
- B.A., New York University

REPRESENTATIVE MATTERS

- Review and advise on the Commodity Futures Trading Commission regulations applicable to an investment fund that includes carbon and/or sustainable assets
- Advise an investment fund, and assist with, the commodity pool operator registration with the National Futures Association/ Commodity Futures Trading Commission
- Review and advise on the Commodity Futures Trading Commission regulations applicable to an investment fund that includes bitcoin and other crypto currencies

Regulatory – OFAC



Richard Newcomb

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EDUCATION

- J.D., Case Western Reserve University School of Law
- B.A., Kenyon College

REPRESENTATIVE MATTERS

- Considerable international experience dealing with target governments, front-line states, like-minded allies, multilateral organizations, financial and business communities worldwide, and others who are responsible for compliance with asset controls and economic sanctions and embargo programs
- Adept at handling regulatory procedures relating to international transactions, including navigating the requirements of the Committee on Foreign Investment in the United States (CFIUS), the Bank Secrecy Act (and anti-money laundering laws), Export Administration Act, Anti-Boycott compliance, US Customs law and the relevant portions of the Patriot Act and the relevant portions of the Patriot Act

Trademark



Victoria Lee

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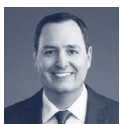
EDUCATION

- J.D., University of California at Davis
- B.A., History and Economics, University of California at Davis

REPRESENTATIVE MATTERS

- Genstar Capital and their portfolio company Telestream in the acquisition of Encoding.com, Inc.
- TA Associates and its portfolio company Netwrix in the acquisition of Remediant, Inc.

Regulatory – CFIUS



Nicholas Klein

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EDUCATION

- J.D., University of Denver
- B.A., James Madison University

REPRESENTATIVE MATTERS

- John Menzies plc in its US\$751 million acquisition by Agility Public Warehousing K.S.C.P
- insightsoftware in its US\$1 billion investment from Hg Capital
- STORE Capital Corporation in its US\$14 billion acquisition by GIC and Oak Street Capital, a division of Blue Owl Capital

Debt / Finance



Ryan J. Moreno

Partner, New York

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EDUCATION

- J.D., New York University School of Law
- B.A., History, American University

REPRESENTATIVE MATTERS

- Various insurance companies, including Resolution Life and Brighthouse, as investors in multiple rated note feeder fund investments with sponsors like HPS, BlackRock, Oakhill and Carlyle
- PenSam A/S as note purchaser in a US\$175 million investment in a CFO structure managed by KKR
- Utah Retirement Systems as lender in a US\$15 million subscription facility provided to a venture fund managed by Signal Peak Ventures Longpoint Realty Partners in connection with multiple subscription

Canada - Tax



Geneviève Lille

Counsel, Toronto

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EDUCATION

- LL.M., Osgoode Law School
- LL.B., and B.C.L., McGill University

REPRESENTATIVE MATTERS

- A large EU-based, independent private equity company on structuring a closed-ended alternative investment fund with Canadian institutional investors and target investments in Canada
- One of the largest U.S. pension plan on investments in Canadian-based infrastructure funds
- A large French asset manager with a focus on renewable energy in structuring its investment in a Canadian developer of biomethanation projects



Kevin Fritz

Partner, Toronto

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EDUCATION

- LL.M., University of Toronto
- LL.B., Dalhousie University
- B.A., University of New Brunswick

REPRESENTATIVE MATTERS

- Overbay Capital Partners in the formation and offering of Overbay Capital Partners Fund XVI and Overbay Capital Partners 2023 Fund
- Kensington Partners in the sale of interests in private equity funds as part of secondary sales process
- Overbay Capital Partners in the purchase of interests in private equity funds as part of secondary sales process

Luxembourg Funds



Caroline Pimpaud

Partner, Luxembourg

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EDUCATION

- Master's, Corporate Law, University School of Law, France
- Master's, Management with specialization in Tax and Law, EDHEC Business School, France

REPRESENTATIVE MATTERS

- Zavarovalnica Triglav in its investment in several Luxembourg investment funds including a Luxembourg investment fund managed by Angelo Gordon
- A Korean sovereign wealth fund in several investor fund reviews and negotiations for their investments in Luxembourg investment funds including funds managed by Antin, Astorg and GLP Europe Management
- A French multinational insurance company in several investor fund reviews and negotiations for their investments in investment funds, including funds managed by KKR, AlpInvest, Thoma Bravo, Tikehau, EQT and Hellman & Friedman

Asia Funds



Luke Gannon

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EDUCATION

- B.A., Law, University of Queensland, Hons
- B.A., Commerce, University of Queensland, Hons

REPRESENTATIVE MATTERS

- A Swiss based asset manager in its investment in a fund investing in student accommodation in Australia
- A sovereign wealth fund in its investment in a fund which invests primarily in housing opportunities in the U.S. residential sector
- A Hong Kong based insurance company in its investment in a master-feeder fund structure in China involving a QFLP and investing in equity investments

UK Debt / Finance



David Ampaw

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EDUCATION

- College of Law, London, Legal Practice Course
- LL.B., London School of Economics and Political Science, Hons

REPRESENTATIVE MATTERS

- A US fund in connection with a restructuring and US\$200 million "debt for vessel" exchange transaction
- The senior noteholders in relation to the first restructuring of a whole business securitization (GBP400 million)
- An ad hoc bondholder group in relation to the EUR300 million restructuring of a Southern European shipping group