

Schulte Roth & Zabel Bolsters UK Tax Practice with Addition of Dan Roman

London — 2 February 2023 — Schulte Roth & Zabel (SRZ) today announced the addition of Dan Roman as a partner in the London office and a member of the Tax Group.

Dan joins SRZ with extensive legal and financial experience. This encompasses a wide range of complex tax matters, including designing and managing fund structures, advising on cross-border asset management issues, Brexit restructurings and deferred compensation arrangements.

He has also advised institutional asset management and investment firms on taxation issues through his roles as a partner at Deloitte and KPMG, and prior to that at Ernst & Young, where he handled tax issues relating to hedge funds and investment management more generally. He was most recently the Group Head of Tax and CFO for a sovereign wealth fund-backed energy insurance startup.

“Dan’s addition to the team will greatly expand our UK tax capabilities,” said Josh Dambacher, co-head of the firm’s London office. “At KPMG, Dan was pivotal in the launch of their hedge fund practice, and he has extensive experience managing credit and deferred compensation structures. Our clients look to us for strategic guidance to manage their complex credit and tax structures, and Dan will be a critical component of providing that counsel.”

“Dan’s experience speaks directly to market opportunities and challenges, and we are looking forward to having him on board to advise clients in investment structuring and transactions,” said Alan S. Waldenberg, co-head of the firm’s Tax Group. “Working closely with Partner Nick Fagge, Dan will play an instrumental role in expanding our capabilities in tax and investment management.”

“Economic uncertainty is generating a unique set of challenges for investment managers in terms of corporate tax compliance. SRZ has market-leading capabilities across the full spectrum of private fund operations, and I look forward to working with my new colleagues to provide needed clarity and measurable value,” said Dan.

Dan received a Bachelor of Arts degree in Philosophy and Law from King's College, Cambridge University, attended the Inns of Court School of Law prior to qualifying as a barrister, and has an MBA from the European Institute of Business Administration (INSEAD). He is also proficient in Hungarian and Hebrew.

About Schulte Roth & Zabel

Schulte Roth & Zabel LLP is a full-service law firm with offices in New York, Washington, DC and London. As one of the leading law firms serving the financial services industry, the firm advises clients on investment management, corporate and transactional matters, and provides counsel on securities regulatory compliance, enforcement and investigative issues. The firm's practices include: antitrust; bank regulatory; bankruptcy & creditors' rights litigation; blockchain technology & digital assets; broker-dealer regulatory & enforcement; business reorganization; complex commercial litigation; cybersecurity & data privacy; distressed debt & claims trading; distressed investing; education law; employment & employee benefits; energy; environmental; estate planning; estate & trust administration; environmental, social and governance (ESG); family law; finance & derivatives; financial institutions; hedge funds; insurance; intellectual property, sourcing & technology; investment management; litigation; litigation finance; mergers & acquisitions; nonprofits; philanthropic planning; PIPEs; private credit, distressed investing & direct lending; private equity; real estate; real estate capital markets & REITs; real estate litigation; regulated funds; regulatory & compliance; securities & capital markets; securities enforcement; securities litigation; securitization; shareholder activism; structured finance & derivatives; tax; trading agreements; and white collar defense & government investigations.

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