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Karen J. Loga
Special Counsel

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Focuses on tax aspects of private investment funds, including structuring of domestic and non-US hedge funds, private equity funds, real estate funds and insurance dedicated funds.

Karen advises clients with respect to offering documents, partnership agreements and related materials for funds and investment management businesses. She also advises investors in private investment funds, which includes negotiating terms, structures and side letters.

She advises clients on tax aspects of mergers and acquisitions, as well as a variety of other multinational corporate transactions, and on tax considerations in real estate transactions, including structures involving joint ventures and real estate investment trusts.

Practices

HEDGE FUNDS

INVESTOR REPRESENTATION

PRIVATE EQUITY

TAX

Bar Admissions

New York

Virginia

District of Columbia

Education

Georgetown University Law Center, LL.M.

The George Washington University Law School, J.D.

Miami University, B.S./B.A.

Publications

- *Alternative Funds Guide 2022*, Chambers, co-author
- *Alternative Funds Guide 2021*, Chambers, co-author
- "Tax Update: IRS and New York State Delay April 15 Income Tax Return Filing and Tax Payment (Uncapped) Deadlines Until July 15 (COVID-19)," *Schulte Alert*, April 3, 2020

Speaking Engagements

- “Insurance Dedicated Funds,” SALI Fund Services Fall Private Placement Conference, New York, Oct. 2019
- “Insurance Dedicated Funds and Related Strategies,” Schulte 28th Annual Private Investment Funds Seminar, New York, Jan. 2019
- Guest Lecturer, Securities Regulation: The Broker-Dealer Perspective Class, Fordham University School of Law, Nov. 2016
- “Insurance-Dedicated Funds: Tax and Corporate Issues,” Schulte Webinar, Sept. 2016
- Schulte Luncheon for Investment Manager Tax Professionals, May 2016
- Guest Lecturer, Hedge Funds Class, Columbia Business School, April 2011
- Guest Lecturer, Hedge Funds Class, New York Law School, Aug. 2010