

Dan Roman

Partner

Contact

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One Eagle Place
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Focuses on private funds and their managers.

Dan advises investment management clients, from entrepreneurial start-ups to established institutional managers, on the advisory and compliance aspects of UK and cross-border tax matters.

His experience encompasses a broad range of complex tax matters, including designing fund structures, advising on domestic and international management company issues, Brexit-related reorganizations, and deferred compensation arrangements. His previous experience includes leading KPMG's hedge fund tax practice in the UK.

Dan is proficient in Hungarian and Hebrew.

Practices

TAX

INVESTMENT MANAGEMENT

HEDGE FUNDS

PRIVATE EQUITY

CREDIT AND DIRECT LENDING FUNDS

Bar Admissions

Regulated to practice by the Bar Standards Board (England and Wales)

Education

INSEAD, M.B.A.

Inns of Court School of Law, City University, Bar Vocational Course

King's College, Cambridge University, B.A.

Publications

- "UK LLPs–Salaried Member Rules: UT Decision in *HMRC v BlueCrest Capital Management (UK) LLP*," *Schulte Alert*, Oct. 27, 2023
- "Anson: Practical Implications for Investment Managers and Funds," *International Tax Review*, October 2015, co-author

Speaking Engagements

- “Tax Considerations 2024,” 33rd Annual Schulte Private Capital Forum, January 2024
- “Management Group Matters,” Schulte London Investment Management Hot Topics, May 2023

Prior Experience

- Paratus Group of Companies
- Deloitte
- KPMG
- Ernst & Young
- Covington & Burling, London
- Lovells