



Jason Walton

PARTNER

THE LINK VIRTUAL

MILWAUKEE, WI*

OFFICE

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OVERVIEW

With a lifelong interest in tax matters, Jason has practiced exclusively in tax law for 20 years.

Jason has an extensive background in transactions that produce federal and state tax credits, with an emphasis on renewable energy, new market, affordable housing and historic tax credits. Jason represents investors throughout the tax credit investment process, working to shepherd clients through the tax structure as capital is deployed. With a focus on practicality, he's known among clients as an attorney who understands not only the tax law but also their unique business aims.

Jason's only passion isn't tax law: he's equally passionate about clients' final projects. He views his job as helping people build projects that benefit the larger community and the next generation—whether that's a solar project, the restoration of a historic building or the revitalization of a struggling area. Clients value Jason's dedication to maximizing not just tax credits but a project's impact.

In addition to his tax credit work, Jason also provides guidance on the tax aspects of real estate financings, mergers and acquisitions, debt and equity offerings and restructurings, fund formations, and financing structures.

Industry

Financial Services & Capital Markets

Services

Development Incentives & Tax Credits

Tax

Tax Credits

Experience

- Represent investors and companies in connection with their tax credit investment activities, including renewable energy, new market, affordable housing, and historic tax credits.
- Provide guidance on the tax aspects of real estate financings, mergers and acquisitions, debt and equity offerings and restructurings, fund formations, financing structures, and tax credits.
- Represent portfolio servicers in CMBS transactions and the transfer of interests involving REMIC trusts.

Education

- LL.M., New York University School of Law
 - American Bar Association Section of Taxation Committee on Corporate Tax
 - Volunteer Income Tax Assistance
- J.D., Washington and Lee University School of Law
 - *cum laude*
 - Volunteer Income Tax Assistance
- M.B.A., Spring Hill College
 - *summa cum laude*
- B.S., Spring Hill College
 - *summa cum laude*
 - Accounting

Admissions

- Massachusetts
- New York
- North Carolina
- Rhode Island
- South Carolina

Jason is associated with the Milwaukee office for telephone purposes only. He is not admitted to practice in Wisconsin.

Community Leadership

Jason is active as an elder at Mount Pleasant Presbyterian Church.

*Jason works remotely and is licensed in South Carolina, practicing in Mount Pleasant. Contact Jason via e-mail or phone for in person/virtual meetings. Use the address 75 Port City Landing, Suite 110, Mount Pleasant, SC 29464 for mail/deliveries.