



William M. Joseph

Counsel

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Corporate Law | Energy Law | Fund Formation | Mergers & Acquisitions | Private Equity and Venture Capital | Tax Law

William “Bill” Joseph counsels large and middle-market businesses and business owners on the tax aspects of domestic and cross-border transactions. His practice includes M&A tax structuring, private equity and real estate fund formation, tax planning for inbound and outbound investment, and advising on tax-exempt entity tax issues. He serves as principal tax counsel for corporate boutique law firms and insurance MGA businesses. Bill has regularly advised national clients on Georgia state and local tax incentives.

Bill’s day-to-day work centers on making complex tax rules practical and actionable for clients pursuing transactions and investments. He structures acquisitions and divestitures, joint ventures, and fund formations with attention to both U.S. federal tax efficiency and the interplay of state, local, and international tax regimes. A significant part of Bill’s practice has also involved obtaining guidance from the IRS—whether private letter rulings for exempt organizations or rulings on novel statutory questions.

Bill regularly partners with business clients and their accounting teams to analyze tax consequences, prepare disclosure, and deliver tax opinions in connection with M&A transactions ranging from middle-market deals to billion-dollar sales. He negotiates tax provisions in purchase agreements, structures tax-efficient exit strategies, and counsels on post-acquisition integration.

REPRESENTATIVE EXPERIENCE

- Obtained IRS revenue ruling designating a U.K. commodities exchange as a "qualified board or exchange," the first such ruling in over 20 years.
- Provided tax planning, disclosure, and opinion for \$2.1 billion sale of credit card processing company to major bank.
- Structured \$300 million real estate joint venture between U.S. investors and Canadian pension funds.
- Analyzed and secured Georgia state tax incentives for consumer foods company opening new facilities.
- Obtained IRS ruling establishing exemption for governmental group health benefits plan.

EDUCATION

LL.M. in Taxation, Boston University School of Law

J.D., Boston University School of Law, cum laude

B.S. Econ., University of Pennsylvania, Concentrations in Accounting and Political Science, cum laude

BAR ADMISSIONS

Georgia

Massachusetts

New York

U.S. Tax Court

MEMBERSHIPS

American Bar Association, Tax Section

State Bar of Georgia, Tax Section

Atlanta International Tax Study Group

RECOGNITIONS

Best Lawyers in America, Tax Law, 2021–2026

GaBiz Magazine, Top Lawyers, Tax Law, 2025–2026

Georgia Trend Magazine Legal Elite, 2012, 2014, 2016–2021

Super Lawyer Georgia, 2019–2022

Martindale-Hubbell AV Preeminent

PUBLICATIONS AND SPEAKING ENGAGEMENTS

- Speaker, "U.S. Income Taxation and Withholding on Sales of Partnership Interests by Non-U.S. Partners," Atlanta International Tax Study Group, February 2021
- Speaker, "Evaluating Tax Shelter Involvement," Stites & Harbison Risk Management Seminar, October 2022
- Speaker, "Proposed Border Adjustment Tax," Atlanta International Tax Study Group, April 2017
- Speaker, "Taxation of Dividend Equivalent Payments under IRC Sec. 871(m)," Atlanta International Tax Study Group, April 2014
- Speaker, "Mergers and Acquisitions for the Middle Market," Fulcrum Information Services, Atlanta, Washington, D.C., and Miami