

RUSSELL J. STEIN

Partner

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Russell focuses his practice on advising businesses on mergers and acquisitions and general corporate matters, the intricacies of U.S. Federal and State tax regulations, and advising nonprofit charities and charitable foundations on Federal tax regulations and State charitable regulations as well as general business matters. Russell has extensive experience counseling businesses on business and tax matters relating to corporate mergers & acquisitions, real estate development and investment fund structuring, tax planning, business restructurings, partnership taxation and Opportunity Zone Investments. He has considerable experience in drafting partnership agreements, reviewing and negotiating merger agreements, and advising companies on tax structuring regarding international holdings.

Russell advises nonprofit organizations, charities, and private foundations on a variety of issues ranging from start-up organizational matters through mergers and dissolutions. Russell provides guidance on joint ventures and partnerships between nonprofit and for-profit entities, including advice regarding state regulations and registration requirements involving commercial co-venture agreements.

Russell is a frequent speaker and writer on tax issues for businesses and nonprofit organizations.

Russell serves on the board of directors of Thrive Scholars, a national non-profit helping high-achieving, low-income underrepresented students get into and graduate from top colleges equipped to achieve their full career potential. Russell is a former Co-Chair of the Boston Bar Association Tax Section, and former Co-Chair of the Boston Bar Association Tax-Exempt Fundamentals Committee.

Practice Areas

Corporate & Business | Energy & Environmental | Nonprofit & Tax-Exempt | Real Estate | Tax |

Education

Boston University School of Law, J.D. and LL.M.

Boston University School of Management, M.B.A

Northwestern University, B.A.

Bar Memberships

Massachusetts

New Hampshire

Rhode Island

U.S. District Court, Massachusetts

U.S. Tax Court

U.S. Supreme Court

Personal Note

Russell was born into a tax family, both his parents were CPAs and he started his tax career as a teenager copying tax returns at his father’s CPA firm in Pleasantville, New York. After college, Russell joined the family tax software business, Pencil Pushers Tax Software, where he not only learned about taxes but also the intricacies involved in running a growing privately-held family business. Russell resides in Newton, Massachusetts, with his wife and son and all their books and Legos.