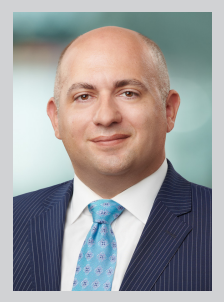
FLASTER GREENBERG
Attorneys at Law | A Professional Corporation



Steven S. Poulathas

Shareholder

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Steven S. Poulathas serves as Flaster Greenberg's Co-Managing Shareholder. He is immediate-past chair of the firm's Business & Corporate Department, and serves on the firm's Board of Directors. He also is a member of the firm's Taxation, Trusts and Estates and Employee Benefits Practice Groups. He counsels and represents individuals, family-owned businesses and public companies in the tax, business and finance, and estate practices. In his capacity as a general outside counsel for privately held companies, his clients find him to be a trusted advisor that becomes an integral part of their business team.

With an LLM in Taxation and prior experience at the Internal Revenue Service in the Office of Chief Counsel, Mr. Poulathas has in-depth knowledge of the tax laws and assists clients with planning and structuring business and real estate transactions, mergers, and reorganizations to minimize tax burdens. He also represents taxpayers before the IRS or other state taxing authorities with tax appeals, voluntary disclosures, and other collection matters. In addition to providing advice and counsel regarding methods to strengthen the net results of businesses and individuals, Mr. Poulathas provides tax opinions, assists in the procurement of private letter rulings, and resolves tax controversies on the federal and state levels through appeals, both in court as well as through offers in compromise.

With significant transactional experience at Flaster Greenberg and previously at a global law firm, he guides clients in the formation, acquisition, disposition, and reorganization of business entities and their financing needs. Mr. Poulathas also works with clients to achieve a tax-efficient transfer of their businesses and wealth with strategic estate planning and estate administration.

In the employee benefit area, Mr. Poulathas formulates compensation arrangements together with qualified and non-qualified plans, and equity compensation, while also addressing compliance requirements and various corrections programs.

Practice Areas

Tax Law

Business and Corporate Law

Trusts and Estates Law

Employee Benefits and Executive Compensation Law

Healthcare Law

Labor and Employment Law

Industry Groups

Gaming

Healthcare

Higher Education

Nonprofit & Charitable Organizations

Pharmaceutical

Restaurant & Hospitality

Admissions

New Jersey

Pennsylvania

U.S. Tax Court

U.S. District Court for the Eastern District of Pennsylvania

U.S. District Court for the District of New Jersey

Education

- Villanova University School of Law, J.D., *summa cum laude*
  - Order of Coif

Mr. Poulathas frequently publishes articles and lectures on the areas within his practice. Since joining the firm in 2008, he has been named a New Jersey "Rising Star" by *New Jersey Super Lawyers* magazine and an Awesome Attorney by *South Jersey Magazine*. A civic leader and active volunteer in the community who is fluent in Greek and with conversational skills in Spanish, he is a legal advisor to the U.S./Greece Business Advisory Council and the Chios Societies of America and Canada. He has served in various leadership positions at St. Nicholas Greek Orthodox Church in Atlantic City and was integral to its capital campaigns. Mr. Poulathas has also provided significant *pro bono* legal assistance to a variety of nonprofit charities and religious organizations.

Mr. Poulathas graduated *summa cum laude* from Villanova University School of Law where he ranked in the top five of his class. While in law school, he was a member of the Order of the Coif and served as associate editor of the *Villanova Law Review*. In addition, he served as an Internal Revenue Service extern in the Office of Chief Counsel in Philadelphia and judicial extern for the Honorable Norma L. Shapiro, U.S. District Court for the Eastern District of Pennsylvania. He has obtained his LLM in Taxation from Villanova University School of Law. Prior to joining Flaster Greenberg, Mr. Poulathas was a tax associate at the global law firm of Morgan, Lewis & Bockius LLP.

REPRESENTATIVE MATTERS

- Led a team of multidisciplinary attorneys in the representation of a provider of Medicare benefit solutions in connection with its recapitalization project with a private equity firm. The complex transaction entailed significant M&A, asset protection, estate and income tax planning.
- Acquisition and dispositions of multimillion-dollar family owned businesses
- Abatement and compromise of Trust Fund (employment/sales tax) Assessments
- Tax-free reorganization and spin-offs
- Estate planning incorporating Last Will & Testament, Living Will and Health Directive, Medical Power of Attorney, General Power of Attorney and various Revocable and Irrevocable Trusts and gifting program
- Employee benefit plan customization including Phantom Equity Plans and Stock Equity Plan and compliance matters with IRC 409A
- Formation of real estate syndicate with asset protection
- Healthcare practice formation with emphasis on tax efficiency and Stark and anti-abuse compliance
- Represented a newly formed wholesale agent/broker of pharmaceuticals entity in purchasing a brokerage agreement allowing it to become the exclusive broker of certain hemp derived cannabinoid active pharmaceutical ingredients

- Associate Editor, *Villanova Law Review*
- Finalist, Moot Court Competition
- Villanova University School of Law, LL.M., Taxation
- Villanova University, B.S., Accountancy, Minor, Economics, *summa cum laude*
- Valedictorian

Languages

Greek

- Represented an importer and wholesale distributor of fine wines and craft beers in the purchase of the assets of another wholesale distributor
- Represented a business of sourcing, marketing, distributing and supplying fasteners and related assembly components, bolts, cable ties, hose clamps and other custom services in the sale of substantially all of its assets.

HONORS & AWARDS

- Named a Law Influencer, *ROI-NJ*, 2022
- Named an Awesome Attorney, Tax Law, *South Jersey Magazine*, 2009, 2013 & 2020
- Named an Awesome Attorney, Corporate Law, *South Jersey Magazine*, 2022
- Named a New Leaders of the Bar, *New Jersey Law Journal*, 2017
- Named a New Jersey "Rising Star," 2010 – 2017, by Thomson Reuters, publishers of *New Jersey Super Lawyers* magazine
- Named a Pennsylvania "Rising Star," 2017, by Thomson Reuters, publishers of *Pennsylvania Super Lawyers* magazine
- Top Attorney List, Taxation, *SJ Magazine*, 2014 & 2017
- Named to the Burlington County Forty Under 40 Class by the *Burlington County Times,* 2014

A description of the standard or methodology on which the accolades are based can be found here. No aspect of this advertisement has been approved by the Supreme Court of New Jersey.

PROFESSIONAL AFFILIATIONS

- American Bar Association
  - Member, Tax Section
- Burlington County Chamber of Commerce
- Camden County Bar Association
  - Chair, Health Care Law Committee
  - Member, Tax Section
- Philadelphia Bar Association
  - Member, Tax Section

COMMUNITY ACTIVITIES

- Entrepreneurs Forum of Greater Philadelphia
  - Former Board Member
- St. Nicholas Greek Orthodox Church
  - Former Vice President, Board of Trustees
  - Chairman, Beautification Committee (overseeing multi-phase fundraising project)
- U.S./Greece Business Advisory Council
  - Former Legal Advisor

- Chios Societies of America and Canada
  - Legal Advisor

ARTICLES & ALERTS

New Jersey Real Estate Tax Appeal Deadline Approaching, April 1st for Many
Legal Alert (March 3, 2021)

Why Some Attorneys Get Off The BigLaw 'Treadmill'
Law360 Pulse (February 12, 2021)

Flaster Greenberg passes leadership to a new generation with firm's first co-managing shareholders
The Philadelphia Business Journal (October 8, 2020)

Co-Managing Shareholders to Take Over Leadership at Flaster Greenberg
The Legal Intelligencer (October 7, 2020)

NJ Passes New Workaround Rule for SALT Deductions
Legal Alert (January 29, 2020)

Private Sector Assistance - Small Businesses in New Jersey
New Jersey Business Magazine (October 2018)

Non-Grantor Trust: A Tool for Estate, Asset Protection and Income Tax Planning
Capaldi Reynolds & Pelosi Newsletter (August 23, 2018)

The New 20% Deduction in Crowdfunding Transactions
Blog Post (January 23, 2018)

Resolving Physician Disputes with Hospital Medical Staffs Through the Use of Confidential Settlement Agreements
MedStaff News (December 2016)

NJ Doctors Face Increased Prosecutions for 'Indiscriminate' Prescribing of Pain Meds
New Jersey Law Journal (February 23, 2015)

Closely Held Business Can Enjoy Captive Insurance Opportunity
Estate Planning Magazine- Posted with permission of Thomson Reuters (January 2015)

Give Yourself the Gift of Tax Planning
Legal Alert (November 21, 2013)

Sandy-Related Property Damage and Real Estate Tax Assessments: How Property Owners Can Seek Tax Relief
Legal Alert (December 6, 2012)

A New IRS Voluntary Disclosure Initiative for Offshore Account Holders | Coupled with New Enforcement Tools Against Those Who Do Not Participate
Legal Alert (February 27, 2012)

Now Available - Tax Credits for Small Business Healthcare Premium Costs
Legal Alert (May 16, 2010)

IRS and New Jersey Department of Taxation Grant Extension to Taxpayers in New Jersey Counties Affected by Flooding
Legal Alert (April 12, 2010)

65% Subsidy of COBRA Health Insurance Premium
Legal Alert (February 24, 2009)

Employer-Owned Life Insurance Contracts: When and How To Use Them
New Jersey Law Journal (February 10, 2009)

Stimulus Package includes 65% subsidy for COBRA Health Insurance Programs
Legal Alert (April 26, 2008)

Severance Plans and ERISA
Legal Alert (April 26, 2008)

White Paper: Tax and Reporting Issues Affecting Attorney Fees in Settlement: Post the U.S. Supreme Court's Banks Decision and the American Jobs Creation Act of 2004
(2004)