

Jordan J. Bergmann

Partner

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Milwaukee

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Jordan Bergmann is a tax specialist and corporate lawyer, advising clients on a diverse array of domestic matters. A significant part of Jordan's practice involves advising clients on the tax aspects of mergers and acquisitions. Jordan navigates clients through the intricacies of M&A transactions, from complete company sales to creatively structured deals with retained equity for selling shareholders. He takes a lead role in negotiating equity rollover arrangements, ensuring both tax efficiency and the satisfaction of his clients with all non-tax aspects involved.

One of Jordan's areas of focus is also counseling clients on the effects of the "Golden Parachute" rules found in Section 280G of the Code. He guides clients through complex calculations and the shareholder vote process, making certain they understand and comply with the requirements.

Aside from his M&A Practice, Jordan's experience extends to a wide range of tax and corporate considerations for privately held businesses. He assists clients in selecting the optimal entity structure for their ventures, designing equity compensation incentives tailored to partnerships, and structuring tax aspects of new investments. Jordan also works extensively with the Qualified Small Business Stock exclusion under Code Section 1202, providing his clients with insights into its many intricacies.

Representative Experience

- Facilitated the acquisition of Vive Organic, Inc., a brand of immunity-supporting booster shots created by holistic medical professionals, by Suja Life, LLC, a portfolio company of Paine Schwartz Partners.
- Negotiated the growth capital partnership for A1 Garage Door Service Holdings, Inc. (A1), a prominent player in the direct-to-consumer residential repair and replacement garage door services industry. The strategic partnership was formed with an affiliated investment group spearheaded by Cortec Group Fund VII, L.P., an investment portfolio managed by Cortec Group.
- Successfully closed a comprehensive multilevel financing initiative for a multinational company, enabling the establishment and operation of oncology centers in India.

- Represented a veteran-owned distillery in securing a pivotal investment from a major wine and spirits distributor, positioning the distillery for enhanced growth and market expansion.
- Provided counsel to nVent Electric plc concerning golden parachute matters pertaining to its landmark \$1.1 billion acquisition of ECM Industries, LLC, ensuring compliance with regulatory requirements and optimal shareholder outcomes.

Awards and Recognition

- Best Lawyers: Ones to Watch recognition for:
 - Corporate Law (2022, 2024)
 - Employee Benefits Law (2022)
 - Tax Law (2022-2024)

Presentations and Publications

- Co-author, "Tax Law" chapter in the Wisconsin State Bar's *Annual Survey of Wisconsin Law* (2015 and 2016).

Sectors

- [Family Offices](#)

Practice Areas

- [Corporate](#)
- [Employee Benefits & Executive Compensation](#)
- [Mergers, Acquisitions & Complex Reinsurance Transactions](#)
- [Taxation](#)

Education

- University of Wisconsin Law School (J.D., summa cum laude, 2014)
 - Member of the Wisconsin Moot Court Board
 - Order of the Coif
 - Student attorney for the Law & Entrepreneurship Clinic
- University of Wisconsin (B.S., 2012)
 - Offensive lineman for the Wisconsin Badgers Football Team

Admissions

- Wisconsin