



**Hahn Loeser & Parks LLP**

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**PRIMARY PRACTICES**

Business Law

Business Succession Planning

Corporate Securities

Employment Contracts & Employment Policies

Estate Planning

Estate Settlement

Fiduciary Services & Trust Administration

International Business

Mergers & Acquisitions

Middle Market

Nonprofit & Art Law

Taxation & Tax Controversy – Trusts & Estates

Tax Controversy and Transaction Advice

Trusts & Estates

Taxation & Employee Benefits

Jonathan Wolnik is a partner in Hahn Loeser's Cleveland office and is a member of the Business Practice Area. He counsels privately owned businesses on all matters of federal, state, and local tax compliance, including tax planning and multi-million-dollar audit resolution. Jonathan advises his business clients with respect to organizational structuring (choice of entity), contracts and agreements, transaction guidance, and corporate and partnership tax planning, including use of limited liability companies, partnerships, and S corporations. He has experience working with clients on complex mergers and acquisitions, in both national and international markets.

He is knowledgeable of ERISA, including the design and implementation of defined benefit pension, profit sharing, cash balance, 401(k) and 403(b) tax-sheltered annuity plans. He is experienced in the design and implementation of executive compensation plans of all types, including split-dollar, deferred compensation, restricted stock, phantom stock, and stock option plans, including plans funded through rabbi trusts.

Before becoming a lawyer, Jonathan was a Certified Public Accountant, primarily serving middle market clients' audit, assurance, tax, and operational needs, as well as working on accounting issues associated with high-net-worth individuals. Jonathan's previous experience as an accountant gives him unique insights into commercial enterprises' management and operational structures. He understands accounting, finance, economics, risk management and asset administration, which enables him to solve legal problems without missing bigger economic consequences. Additionally, he has experience investigating and resolving internal frauds perpetrated against business clients.

**REPRESENTATIVE EXPERIENCE**

**Significant M&A Transactions**

- Represented seller, a machinery fabricator and installer, in \$20 Million minority equity interest sale.
- Served as domestic co-counsel to private equity international buyer in \$75 Million domestic technology company acquisition.
- Represented seller in industrial services and equipment sector with a multi-million-dollar total equity sale.
- Represented seller in logistics and product transportation services sector in multi-million-dollar asset sale.
- Represented seller in hazardous materials industry with \$12 Million equity rollover and partial sale.
- Represented international seller in \$5 million Ohio heavy equipment factory sale.
- Served as domestic counsel to international buyer in the global transportation industry, closing a multi-million-dollar equity acquisition.
- Represented buyer in million-dollar lawn care company asset acquisition.
- Structured and created multi-million-dollar Qualified Opportunity Zone investment enterprise.
- Represented strategic international buyer in \$6M acquisition of domestic software company.
- Represented footwear company in \$2M buyout.

### **General Counsel Services**

- General counsel to national software company in healthcare space.
- General counsel to international technology company in healthcare space.
- General counsel to national telehealth medical practice.
- General counsel to national consulting practice.
- General counsel services to Ohio public charity.
- Former general counsel to national accounting and consulting practice in healthcare space.

### **Tax and Audit Defense Work**

- Defended manufacturing company in million-dollar federal excise tax audit.
- Defended equipment installation company in multi-million-dollar Ohio sales and use tax audit.
- Defended food production company in Ohio sales and use tax audit.
- Defended equipment installation company in New York sales and use tax audit.
- Defended marketing company in Texas sales and use tax audit.
- Defended out-of-state products import Company in Ohio Commercial Activity Tax audit.
- Defended international retailer against Ohio Commercial Activity Tax phantom assessments.
- Defended high net worth individual's estate and gift tax strategy, involving tax-affecting of gifted business interests, against IRS audit.

### **Non-Profit Work**

- Structured private foundation for multi-million-dollar art collection.
- Structured multiple private foundations and private operating foundations for advancement of family charitable goals.
- Assisting public charities with succession planning and operational issues.

### **BAR ADMISSIONS**

- State of Ohio

### **EDUCATION**

- J.D., The University of Akron School of Law, magna cum laude, 2015
- Board of Trustees Scholarship, Law Review, Assistant Editor
- MBA, John Carroll University, Accounting, 2003
- B.S.B.A., John Carroll University, Accounting, 2002

### **AWARDS & HONORS**

- Ohio Super Lawyers®, Rising Stars, 2022-25
- Ones to Watch, Best Lawyers®, Bankruptcy and Debtor Rights / Insolvency and Reorganization Law, 2023-25, Nonprofit/Charities Law, 2025, Tax Law, 2025, Trusts and Estates, 2025

### **PUBLICATIONS & SPEAKING ENGAGEMENTS**

- The Corporate Transparency Act to Take Effect: What Business Owners Need to Know
- Business Owners to Face New Federal Reporting Obligations

- Under the Corporate Transparency Act in 2024
- Businesses Should Start Preparing for the CTA Now
  - Beware! Corporate Transparency Act Scams Target Business Owners
  - Corporate Transparency Act Tax Roundtable
  - IRS Launches Second ERC Voluntary Disclosure Program
  - U.S. Corporate Transparency Act Huddle, Part 1 (Alliott Global Alliance)
  - Practitioner Pity Party – U.S. Corporate Transparency Act Huddle, Part 2 (Alliott Global Alliance)
  - Answering the Latest CTA Questions Following Recent Court Injunction

#### MEMBERSHIPS & AFFILIATIONS

- Akron Bar Association
- FBI Citizens Academy Graduate
- FBI Citizens Academy Alumni Foundation

#### COMMUNITY INVOLVEMENT

- Augustine Health Ministries, Board Member
- First Friday Club, First Vice President
- Our Lady of Grace Church, Finance Committee Chair
- Loyola Club, Member

#### PROFESSIONAL HISTORY

- Partner, Hahn Loeser & Parks LLP, 2023 – present
- Principal, McCarthy, Lebit, Crystal & Liffman, Co. LPA 2022-2023
- Associate, McCarthy, Lebit, Crystal & Liffman, Co., LPA 2016 -2021