



## Jim S. Lelko, CPA, MST

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**Jim Lelko** is a tax director with our firm and has more than 30 years of experience within the investment management industry, including more than a decade as a tax partner within a Big Four firm.

Jim maintains significant expertise with the issues and trends related to investment company taxation, including for:

- Mutual funds
- Exchange-traded funds
- Hedge funds
- Cayman Islands registered funds
- Private equity funds
- Venture capital funds

As a partner within a Big Four accounting firm, Jim managed a team of 140 tax professionals.

Jim's experience within the investment management industry also includes:

- Determining year-end distribution requirements for regulated investment companies
- Developing offshore fund structures for private investment fund sponsors
- Speaking at conferences on tax-efficient investing for private funds
- Effectively identifying connected income issues for non-U.S. investment platforms
- Working with the IRS on tax controversies and other audit matters for private investment funds
- U.S. tax reporting for non-U.S. investment platforms

Jim is a member of the American Institute of Certified Public Accountants and the Illinois CPA Society. He is a graduate of Cleveland State University, where he earned a Bachelor of Business Administration degree with a major in finance. He also earned a Master of Science degree in taxation from Northeastern University

