

Investment Funds

Overview

Capability

As a full-service law firm, Carlton Fields has the resources necessary to guide a wide range of investors and sponsors in all aspects of their organization funding, operations, and extraordinary transactions. We are engaged in structuring equity, debt, and other asset-backed securities (for example, REITs).

Clients

Our clients invest in or offer a broad range of real estate and real estate-related asset classes (for example, multifamily, industrial, hospitality, retail, and infrastructure), including real estate developers, private equity funds, asset managers, fund sponsors, managers, and venture capitalists.

Capital Markets

Our capital markets lawyers advise clients on securities issues specific to public companies and draft appropriate securities offering documents.

Value

We believe the greatest value comes from our vertical integration of our sophisticated legal team in all aspects of:

- Formation
- Regulatory compliance
- Tax
- Management of domestic and cross-border private investment funds
- Broker-dealer activity (lawyers include former SEC alumni and the like)

Our experience in all stages of the investment cycle allows us to be innovative and efficient.

Regulatory Compliance

In a heightened regulatory environment with increased capital flow and competition, we craft solutions to transactions that are cost-effective and unique to the specific goals of each client.

Offshore

With a core team of experienced capital markets attorneys, supported by our seasoned tax and regulatory lawyers across the firm, we structure onshore and offshore funds for a variety of fund types and advise on the full spectrum of tax, finance, regulatory compliance, and securities issues involved in these transactions.

Market Knowledge

We bring depth of experience and institutional knowledge of the developments and trends in the U.S. and global real estate markets and real estate investment fund industries. We are experienced with all types of venture capital funds and have worked on billion-dollar domestic and cross-border transactions, including more than 200 public REIT filings and 25 REIT initial public offerings. Our principal lawyers are intimately involved in each transaction, bringing to each matter their experience working for private equity fund sponsors and creating unique fund structures and alternative investment strategies.

Our Team

Key Contacts



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Related Practices

- Banking, Commercial, and Consumer Finance
- Development
- Distressed Asset and Workout
- Institutional Investment and Finance
- International Tax
- Investment and Ownership
- Lending

- Private Equity and Venture Capital
- Public-Private Partnerships
- Qualified Opportunity Zone Task Force
- SEC Enforcement

Related Industries

- Banking, Commercial, and Consumer Finance