



## Joseph E. Lundy Counsel

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Joseph E. Lundy has developed a stellar national reputation in matters involving exempt organizations. To this practice, he brings over 40 years of experience as a tax attorney and business advisor, focusing on exempt organizations. Mr. Lundy has hands-on experience in advising healthcare systems, universities, colleges, foundations and other nationally prominent charities throughout the country regarding IRS audits, mergers and acquisitions, restructuring, tax-exempt financing, unrelated business income, and physician practice arrangements as well as fundraising and general compliance matters.

Prior to joining Schnader, Mr. Lundy was a founding partner of Lundy Fleming LLP, a partnership devoted to the legal representation of nonprofit organizations, closely-held businesses and individuals. He was also a principal in the Washington, D.C., New York, and Philadelphia offices of the international accounting and consulting firm PricewaterhouseCoopers LLP. Serving as a leader in the firm's Washington National Tax Services healthcare, higher education, private foundation and other exempt organization tax practice, he was responsible for providing innovative and proactive solutions regarding tax laws and other regulatory matters applicable to exempt organizations. Mr. Lundy was also a partner of the Philadelphia-based law firm Ballard Spahr Andrews & Ingersoll, LLP.

## Education

- New York University School of Law, LL.M., Taxation

- Temple University Beasley School of Law, J.D.
- University of Pennsylvania, Wharton School, B.S.

## Bar Admissions

- Pennsylvania
- Florida

## Professional Affiliations

- American Bar Association Tax Section Exempt Organization Committee, Past Chair
- Pennsylvania Bar Association, Member
- Philadelphia Bar Association Tax Section, Past Chair
- Philadelphia Bar Association, Member
- Florida Bar Association, Member

## Other Distinctions

- Noted among "Pennsylvania Super Lawyers" for Taxation 2006-2019
- American College of Tax Counsel, Fellow
- Temple University School of Law, Adjunct Professor of Law
- *Taxation of Exempts*, Co-editor-In-Chief
- Philadelphia Tax Conference, Founder and Past Chair
- Wharton School Tax Conference, Past Chair
- Penn State Tax Conference, Past Chair
- Faulkner & Gray Exempt Organizations Tax Conference, Past Chair
- Washington Non-Profit Tax Conference, Special Advisor, 1985-1992
- Selected as *Best Lawyers* "2021 Lawyer of the Year" in Non-profit / Charities Law for Philadelphia
- Listed in *The Best Lawyers in America* for Non-Profit / Charities Law, 2017-2022 and Tax Law, 2019-2022

## Practices

- Business Services
- Corporate
- Tax

# Industries

- Higher Education
- Nonprofit