

## Julia D. Corelli

Retired Partner

Philadelphia

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Investment managers trusted Julie to guide them through the legal aspects of fund formation, operation, management and compliance. Her background as a tax attorney with M&A and private equity experience informs her forward-thinking, strategic advice.

### OVERVIEW

Julie is a fellow of The Pepper Center for Public Service. The Pepper Center draws on the talents of the firm's retired partners and senior attorneys to wrestle with tough problems facing our communities. Through the Center, these attorneys study, analyze, and work to resolve problems that affect the lives of people in our communities.

Julie focused her practice on counseling investment funds, sponsors, advisors, and companies throughout their entire business cycle. She has advised more than 80 principal groups on the formation and operation of private investment funds ranging in size from \$50 million to \$1 billion. These funds include private equity, growth, venture, angel, real estate, energy and natural resources, bond, distressed and hedge funds. Clients value Julie's approach to structuring fund formation agreements, which addresses the myriad of possible challenges her clients may face.

Julie regularly advised on issues related to investment fund principal compensation, succession planning, allocations and distributions, buy-sell arrangements, and carry and incentive equity arrangements. She also assisted with separately managed accounts, private wealth advisor services, and broker-dealer issues. Julie serves as general outside counsel to family offices. In this capacity she provides direction on the legal complexities related to the structuring and implementation of customized investment programs as well as day-to-day operations and transactions.

Corporate and other institutional investors also turned to Julie to handle their private equity investment transactions, venture capital investments, acquisitions, dispositions and financings of business enterprises. She designed and developed joint venture and investment partnerships and assisted them in completing investments and joint operating agreements.

Julie is experienced in a variety of industries including biotechnology, nutraceuticals, technology, manufacturing, agriculture, financial services, peer-to-peer lending, health care, energy and natural resources, and real estate.

Julie was a member of the firm's tax group from 1989 through 1998 and became a partner in 1992. She served on the firm's Executive Committee for 12 years and served as its vice chair from 2013 to 2017. Julie retired from the

firm in 2025.

Julie speaks regularly before trade and bar associations on a variety of topics, including domestic and foreign private investment fund formation and operational issues, investment structures used by private investment funds, succession planning and partnership, limited liability company and S and C corporation planning and operational issues.

## **PROFESSIONAL/COMMUNITY INVOLVEMENT**

- Former board member, Malvern Bank (merged with First Bank New Jersey)
- Former member, Boys & Girls Club Northeast Regional Board of Trustees

## **EDUCATION AND CERTIFICATIONS**

### **EDUCATION**

- Villanova University Charles Widger School of Law, LL.M., 1991, taxation
- Villanova University Charles Widger School of Law, J.D., 1984, editor, *Villanova Law Review*
- Yale University, B.A., 1981

### **BAR ADMISSIONS**

- Pennsylvania

### **COURT ADMISSIONS**

- U.S. Tax Court
- U.S. Court of Appeals, Third Circuit
- U.S. District Court, Eastern District of Pennsylvania

### **LANGUAGES**

- French (intermediate)