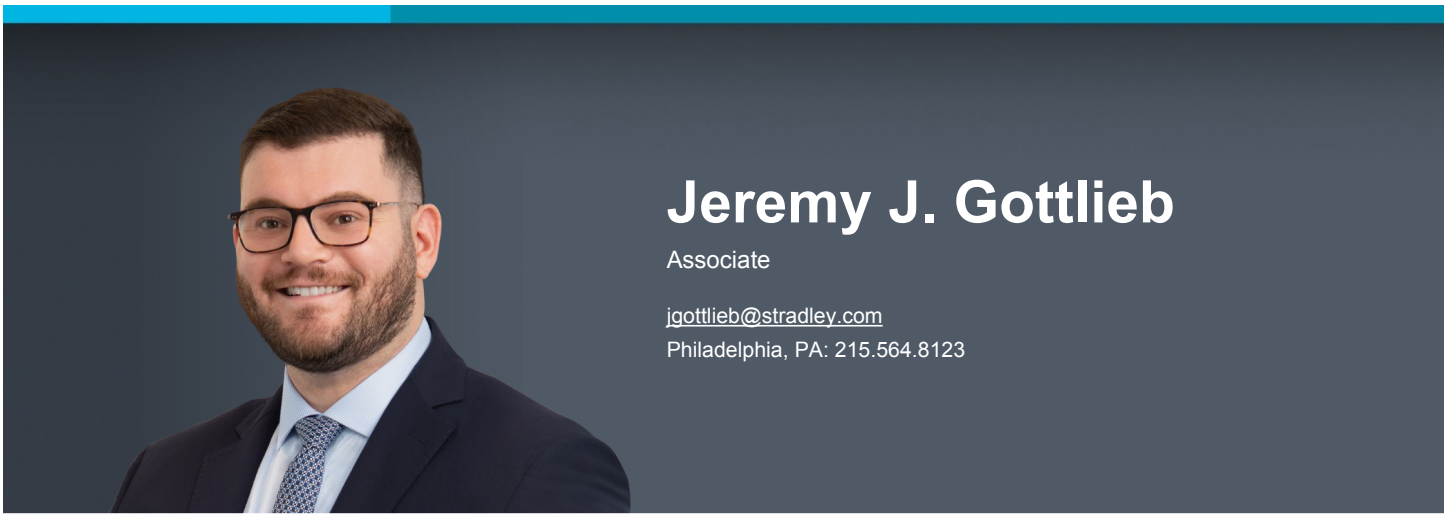
StradleyRonon



Jeremy J. Gottlieb

Associate

jgottlieb@stradley.com
Philadelphia, PA: 215.564.8123

As a member of the firm's retail alternative funds practice, Jeremy Gottlieb regularly provides advice to clients regarding the initial structuring decisions, formation and registration on a wide variety of alternative products, including those structured as interval funds and tender offer funds.

Advising investment management clients in all aspects of legal representation, Jeremy drafts and reviews registration statements, proxy solicitation materials and other regulatory filings; researches various securities and corporate law issues; and prepares board materials.

Jeremy concentrates his practice on a wide variety of investment management-related matters, including counseling exchange-traded funds (ETFs), mutual funds, closed-end funds, interval funds, tender offer funds and investment advisers on legal, regulatory and transactional matters.

Jeremy previously served as an intern at the Office of Public Integrity & Accountability, Conviction Review Unit, New Jersey Attorney General's Office, where he reviewed claims of actual innocence. He also worked as a litigation claims adjuster at one of the largest insurers in the United States.

At Rutgers Law School, Jeremy was a legal teaching fellow and a member of the Hunter Moot Court program.

Featured Representative Matters

- Advised on the conversion of the Bluerock Private Real Estate Fund (formerly, Bluerock Total Income+ Real Estate Fund) (Ticker: BPRE) from an interval fund to an exchange-listed closed-end fund. With $3.5 billion in net assets, BPRE is now the largest listed real estate fund in existence.
- Served as fund and board counsel in connection with the launch of hybrid interval funds formed in strategic partnership between Capital Group and KKR.
- Represented Franklin Templeton in the launch of Franklin Crypto Index ETF, a new index-based, digital-asset-backed ETP.

Services

- Investment Management
- Exchange-Traded Funds (ETFs)
- Interval & Tender Offer Funds
- Listed Closed-End Funds
- Registered Investment Funds
- Retail Alternative Funds

Education

- Rutgers University School of Law – Camden (J.D., *magna cum laude*)
  - Order of the Coif
- Rowan University (B.A., *cum laude*)

Admissions

- Pennsylvania

Publications

The Retail Rewrite: SEC Issues Proposals Intended to Expand Private Markets Access
October 13, 2026

Investing in Private Funds Beyond 15%: SEC Staff Opens the Door for Retail Closed-End Funds
May 22, 2025

A Better Alternative: SEC Approves Simplified Version of Co-Investment Relief for Registered Closed-End Funds and BDCs
April 9, 2025

The Names Rule Pizza Shop: Menu Updates
January 14, 2025

Pension Derisking Options Employee Benefit Plan Review
September 23, 2024

CFTC Raises the Bar for Rule 4.7 QEP Status but Holds Off on Controversial Disclosure Requirements
September 18, 2024

Supreme Court Limits SEC's Home Field Advantage
July 3, 2024

SEC Expands Dealer Definition to Increase Regulation of Liquidity Providers, Now Challenged in Federal Court
March 20, 2024

Experience

Stradley Ronon Advises on Launch of Hybrid Interval Funds Formed in Strategic Partnership Between Capital Group and KKR
Stradley Ronon served as fund and board counsel in connection with the launch of two new interval funds that will provide new ways for investors to incorporate private markets into their portfolios. Formed through a strategic partnership between global investment firms Capital Group and KKR, the funds will offer investors a hybrid strategy that provides exposure to a mix of public and private credit across multiple asset classes, geographies and channels.

Capital Group KKR Core Plus+ will invest in publicly traded fixed-income securities and private credit loans and securities, including private corporate direct lending and asset-based finance investments, allocating about 60% to public debt (managed by Capital Group) and 40% to private credit (managed by KKR).

Capital Group KKR Multi Sector+ will also invest in publicly traded fixed-income

securities and private credit loans and securities with a targeted 60-40 mix but in different segments. The public portion (managed by Capital Group) will focus on high-yield corporate debt (25%), investment-grade corporate debt (10%) and securitized debt (25%). As with the core fund, KKR's private sleeve will focus on corporate direct lending and asset-based finance.

Stradley Ronon Advises Franklin Templeton on its Third Digital Asset ETP Launch in the Past Year

Stradley Ronon represents Franklin Templeton in expanding its digital asset ETP suite, providing counsel on the formation, registration, listing and launch of the Franklin Crypto Index ETF.

The Stradley team is led by partners Steve Feinour and Miranda Sturgis, and includes partner Kenneth Greenberg and associates Wesley Davis, Rachel Charamella, and Jeremy Gottlieb. The tax team includes partners Dean Krishna and Rich Peterson.

Business Vantage Point

The 83(b) Election: How Founders, Employees and Service Providers Can Lower Their Tax Burden

March 13, 2024

Restricted stock awards are generally taxed when they vest, which can often occur months or years after such awards are granted. Stock options are generally taxed at exercise after they have vested (for incentive stock options, the spread between...