StradleyRonon

Richard E. Peterson

Partner

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With a deep breadth of experience in a wide variety of tax matters, Richard Peterson is uniquely positioned to handle both regulated investment company, investment fund and corporate mergers and acquisitions tax-related matters.

He advises on partnership tax planning, including the structuring of U.S. and global investment capital funds of all types, and advises potential investors. Rich has been involved in significant corporate transactions and divestitures, including taxable and tax-free transactions with both asset and stock acquisitions. Rich is also well versed in tax litigation, covering all aspects of IRS controversy work, from audits and appeals work through litigation before the U.S. Tax Court.

Leveraging his extensive knowledge of real estate investment trusts (REITs), Rich has represented various publicly traded and privately held REITs in issuing tax opinions and advising on several REIT conversions, offerings and other transactions. He also serves as tax counsel to governmental issuers, conduit borrowers and exempt organizations regarding various tax exemption matters to corporations and other entities regarding various state and local tax matters.

Featured Representative Matters

- Represented Rhodium, a data and machine learning platform for the wellness industry, in its acquisition of three health, beauty and wellness companies: SiO Beauty, Rootine and Solomomo.
- Represented Franklin Templeton in the launch of Franklin Crypto Index ETF, a new index-based, digital-asset-backed ETP.
- Advised on numerous mutual fund reorganizations.
- Advised the independent board of directors of several mutual funds.
- Advised both public and private offerings of cryptocurrency funds.
- Advised several family offices regarding maximizing the tax efficiency of family investment funds.
- Advised several funds with regard to the specific tax needs of their investors including tax-exempt organizations, university endowment funds, private retirement plans, state retirement plans and sovereign wealth funds.
- Handled competent authority matters pursuant to tax treaties the United States has with other countries.

Services

- Tax
- Corporate, Mergers & Acquisitions, and Securities
- Investment Management Mergers & Acquisitions
- Investment Management Tax
- Emerging Companies & Venture Capital
- Private Equity
- Religious, Educational & Nonprofit Organizations
- Private Investment Funds

Education

- Columbia Law School (J.D.)
- DePaul University (B.S.)

Admissions

- Illinois
- U.S. Tax Court

- Advised both creditors and debtors about tax issues involved with both filed bankruptcy cases and private workouts.
- Advised on several complex tax-free 1031 exchanges, involving multiple owners with different intentions and multiple properties.
- Advised on the acquisition and disposition of several luxury hospitality properties both within and outside the United States.
- Advised major private universities with respect to IRS tax audits.
- Advised on the formation of several tax-exempt organizations, including public charities, private foundations and supporting organizations.

Community Impact

Rich has been active with the Adoption Center of Illinois both before and after the adoption of his two children.

Recognitions

- *The Legal 500* US Elite (Chicago: Tax) (2026)
- AV Peer Review rating, Martindale-Hubbell

Featured Speaking Engagements

- Panelist, "State and Local Taxes: Avoiding Hidden M&A Costs and Complications," Smart Business Dealmakers Conference

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Experience

Stradley Ronon Represents 1st Colonial Bancorp in Acquisition by Mid Penn Bancorp

Stradley Ronon advised 1st Colonial Bancorp Inc., the parent company of Mount Laurel, New Jersey-based 1st Colonial Community Bank, in a merger agreement with Harrisburg, Pennsylvania-based Mid Penn Bancorp Inc. in which Mid Penn acquired 1st Colonial in a cash and stock transaction valued at approximately $106.1 million. In connection with the holding company merger, 1st Colonial Community Bank was merged with and into Mid Penn's subsidiary bank, Mid Penn Bank.

The transaction, which was completed on February 27, further expands Mid Penn's presence in the Greater Philadelphia area and southern New Jersey.

Stradley Ronon Advises Covetrus in Connection with Definitive Agreement for Chewy's Acquisition of SmartEquine Business

Stradley Ronon represented Covetrus, a Portland, Maine-based global animal-health technology and services company, with respect to its agreement for Chewy Inc. to acquire its subsidiary SmartPak Equine LLC (SmartEquine). The transaction, announced October 30, is expected to close by year-end subject to customary closing conditions.

SmartEquine is a leading U.S. direct-to-consumer provider of equine nutraceutical supplements. The deal will allow for Covetrus to focus on its core business of delivering technology-enabled solutions that help streamline and strengthen veterinary practices.

Stradley Ronon Advises Silvi Materials in Acquisition of Eagle Rock Concrete
Stradley Ronon represented Pennsylvania-based Silvi Materials, a vertically integrated leader in construction materials, in its acquisition of Eagle Rock Concrete, a premier ready-mix concrete producer based in North Carolina. The transaction closed September 2.

The combined company will operate as Eagle Rock Concrete, a Silvi Materials Company. This acquisition represents Silvi's expansion into the Southeast U.S. construction market, bringing nine high-production ready-mix plants in the Raleigh-Durham area.

Stradley Ronon Represents Allied Resources Group in Acquisition of Verigent
Stradley Ronon represented Allied Resources Group (ARG) in its acquisition of Verigent, a North Carolina-based staffing firm specializing in telecom and IT network infrastructure. The transaction closed July 31; the value was undisclosed.

ARG is a multidisciplinary provider of engineering, staffing, inspection and field services focused on delivering reliable solutions to critical infrastructure clients nationwide. The acquisition will expand ARG's workforce solutions platform and strengthen its presence in fast-growing technical markets across the United States, including the data center infrastructure sector.

Read more about the acquisition.

Stradley Ronon Represents Maple Donuts in Acquisition by Swander Pace Capital
Stradley Ronon represented Maple Donuts, a Pennsylvania-based manufacturer of frozen bakery products, in its acquisition by Swander Pace Capital, a private equity firm focused on investing across the food and beverage industry. The transaction closed on May 30, 2025; the value was undisclosed.

The acquisition will allow Maple Donuts to further expand product offerings and enhance production capabilities.

The Stradley Ronon team was led by Tom Ix and Steve Scolari, with John Hook, Megan Stamm, Rich Peterson, Jon Bloom, Chris Rosenbleeth and Andrew Barron.

For more information, visit Swander Pace Capital's website.

Stradley Ronon Advises Fora Travel in $60 Million Series B and C Funding Rounds
Stradley Ronon represented Fora Travel, a digital platform that powers the next generation of travel entrepreneurs, in $60 million Series B and C funding rounds. This new capital supports Fora's mission to modernize the travel industry by utilizing advanced technology and empowering travel advisers to share their expertise. Series B was led by Insight Partners and Series C by Thrive Capital, with previous supporters Forerunner and Heartcore Capital returning.

One of *Fast Company*'s Most Innovative Companies of 2025, Fora reimagines the travel agency by enabling experienced travelers to serve as travel advisers who book trips and plan itineraries for clients. For more information, visit Fora Travel's website.

Stradley Ronon Advises Rhodium in Acquisition of 3 Beauty and Wellness Companies

Our firm has represented Rhodium in its acquisition of three health, beauty and wellness companies: SiO Beauty, Rootine and Solomomo. Rhodium, a startup backed by Relevance Ventures and Loeb.nyc, is a data and machine learning platform for the wellness industry. The deal will expand Rhodium's suite of offerings for med-spas.

Stradley Ronon Represented TradePMR in Acquisition by Robinhood

Stradley Ronon represented TradePMR, a custodial and portfolio management platform for Registered Investment Advisors (RIAs), in an approximately $300 million acquisition by Robinhood Markets, Inc., which closed on February 26, 2025. TradePMR has over 25 years in the industry, and the acquisition will accelerate Robinhood's delivery of investment advisory capabilities to customers by bringing in a scaled RIA custodial platform with approximately 350 firms and more than $40B in assets under administration.

Read more about the acquisition.

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, Sam Kishiyama and Jeremy Gottlieb. The tax team includes partners Dean Krishna and Rich Peterson.

Business Vantage Point Blog

Proposed Treasury and IRS Regulations for Trump Accounts: What You Need to Know

May 19, 2026

As part of the One Big Beautiful Bill Act , the sweeping tax and domestic policy bill signed into law last July, the Trump Accounts were established under the Working Families Tax Cuts legislation to create new tax-advantaged savings...