SHERRARD, GERMAN & KELLY, P.C.
ATTORNEYS AT LAW

John R. Owen

Counsel

Mr. Owen is Counsel of the firm and a member of the Corporate, Estates and Trusts and Tax practice groups.

Mr. Owen is a speaker and published author with extensive expertise in working with the Internal Revenue Service, Pennsylvania Department of Revenue, Pennsylvania Attorney General, Pennsylvania Auditor General, and various other administrative agencies. Throughout his career, Mr. Owen has represented a broad range of clients, including tax-exempt charities, churches, businesses, healthcare providers, nonprofit organizations, estates and trusts, and individuals. Mr. Owen has been named an "Outstanding Volunteer Attorney of the Year" by the Executive Service Corps of Western Pennsylvania in the past for pro bono legal services to nonprofit agencies in our community as well as the "Allied Professional of the Year" from the Pittsburgh Planned Giving Council for his philanthropy work and contribution. Based on an evaluation process of his peers, Mr. Owen is AV-Rated by Martindale-Hubbell and has been named a Pennsylvania Super Lawyer.

Representative Services

- Nonprofit Organizations
- Business Law
- Tax Law
- Transactions
- Estates and Trusts
- Estate Administration
- Executive Compensation

Education

- M.L.T. (Graduated first in the Day Division), Marshall-Wythe School of Law, College of William and Mary, 1984
- J.D., University of Akron School of Law, 1983 (Akron Law Review Member)
- A.B., Grove City College, 1980 (cum laude)

Professional & Community Activities

- Member, Allegheny County Bar Association (Tax and Nonprofit Law Sections)
- Advisory Council, Bayer Center for Nonprofit Management at Robert Morris University
- Former President and Director, Baptist Homes Foundation

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Practice Groups

- Corporate Services
- Estates and Trusts
- Tax

Bar Admission

- Commonwealth of Pennsylvania
- State of Ohio
- United States Tax Court

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- Human Resources Committee, Civic Light Opera
- Co-Chair, Welsh Nationality Room, University of Pittsburgh
- Advisory Council, Network of Hope, Inc.
- Standards for Excellence Committee and Former Director, Pennsylvania Association of Nonprofit Organizations
- Past President, and Current Chair of Legislative Affairs, Pittsburgh Planned Giving Council
- Former Chair, ACBA Nonprofit Organizations Committee
- Planned Giving Committee, Catholic Diocese of Pittsburgh
- Planned Giving Advisory Council, Duquesne University
- Planned Giving Advisory Council, Grove City College
- Eagle Scout and serves as a volunteer leader with the Boy Scouts of America, Troop 329, McCandless, PA

Selected Engagements

- Represented tax-exempt organizations in mergers, acquisitions and other major corporate transactions, including obtaining approvals from the Pennsylvania Orphans' Court and Office of Attorney General.
- Assist a tax-exempt health care provider in acquiring related and unrelated business operations.
- Assist a tax-exempt charity in obtaining an IRS private letter ruling finding that the operation of housing was related to its charitable mission.
- Assist in the structuring of executive compensation for tax-exempt organizations.
- Assist tax-exempt charities in developing planned giving programs.
- Assist tax-exempt charities in structuring complicated giving strategies using charitable remainder trusts, charitable gift annuities, life estates and remainder interests.
- Assist taxpayers with local real estate assessments, exemptions and appeals.
- Assist individuals with estate administration and preparation of required tax reporting.

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