
Joseph Ferruzzi

Director (Tax)

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Background

Joe is a Director at Grant Thornton Cayman Islands and head of the Tax practice. Joe has 20 years of experience working for some of the biggest names in the industry from both a public accounting and private manager perspective.

Being a native of New York, Joe began his career in asset management tax with a Big-Four firm in New York City where he worked on some of their most significant asset management clients. From there he moved to another Big-Four firm in the Cayman Islands, where he spent four years assisting a predominantly international client base to accommodate U.S. investment into their structures with tax planning, structuring, and compliance services.

Joe returned home to work in industry with Goldman Sachs Asset Management, spending four years working in Goldman's partnership tax group where he looked after the tax compliance and investor reporting for a large portfolio of private equity and hedge fund products.

Joe would spend the next five years at BlackRock, Inc., overseeing the tax compliance function and contributing to the tax planning for a large variety of alternative investment products, while also serving as the Global Head of Alternatives Tax Technology. This experience gained Joe exposure to all aspects of a growing alternative investment management platform from the private side, working directly with portfolio managers, legal teams, fund accountants, operations, investors relations, and IT professionals on a daily basis.

Experience

Joe's many experiences include:

U.S. tax compliance, planning, and structuring for alternative investment structures, managers, and captive insurance companies, taxation of financial instruments, inbound and outbound investment structuring, U.S. federal and state tax controversy, and tax technology and automation. His experience in the private sector has gained him first-hand knowledge of the tax issues faced by today's investment managers including carried-interest planning and structuring, the U.S. tax implications of tax reform, effective maintenance and leveraging of tax data, in-house tax technology trends and tax function innovation.

Professional qualifications and memberships

Joe received his bachelor's degree with a double-major in Accounting and Economics from Florida State University.

Joe is a CPA in the state of New York and a member of the New York State Society of Certified Public Accountants and the American Institute of Certified Public Accountants.