



JONATHAN FORMAN

Managing Director, Tax Credits & Incentives Services

As Managing Director of Global Tax Management's Tax Credits & Incentives Services practice, Jonathan leads the development and delivery of services that help multinational corporations take advantage of available federal, state, and international R&D and related tax incentives to reduce their tax liability.

Jonathan has been involved with R&D for more than 20 years in both technical and taxation capacities, bringing a scientific, IT, and business background to GTM's R&D Tax Credit practice. He has extensive knowledge of U.S. and international R&D tax law, and vast experience dealing with specific issues related to R&D credits and incentives within industries including software, technology, life sciences, manufacturing, and energy. He is a global speaker and instructor and has been published in several key industry journals.

Prior to joining GTM, Jonathan held several leadership roles with BDO USA, including his most recent roles as the Stamford Office Managing Principal and Global R&D Center of Excellence Leader. He was one of the founding members of the firm's national R&D tax credit practice, and created, built, and managed BDO's International R&D Center of Excellence.

Jonathan also spent several years with Big 4 firms including Deloitte and PwC. He created and led the R&D incentives practice for Deloitte in Calgary, Canada where his practice focused on technology, oilfield services, and exploration and production. At PwC, he created one of the first browser-based software tools for managing R&D tax credits.

He is a member of the American Institute of Public Accountants. Jonathan resides in Westchester County, NY where he enjoys spending time with his wife, children, six cats, two dogs, and tortoise.

CONTACT

 jforman@gtmtax.com

 908.458.4214

 626.272.6911

EDUCATION: M.B.A., Centre for Innovative Management,
Athabasca University, Canada

B.Sc., Biological Science, University of Calgary, Canada