



## JOSEPH LALLY

Director, Tax Credits & Incentives Services

As a Director of Global Tax Management's Tax Credits & Incentives Services practice, Joe helps multinational corporations take advantage of available federal, state, and international R&D tax incentives to reduce their tax liability.

For more than a decade, Joe has worked to develop tailored solutions for identifying, calculating, and documenting R&D incentives. He has also supported R&D tax credit studies on IRS and state tax examinations. Joe's breadth of industry experience includes working with technology and software development, life sciences, and manufacturing companies to understand the nuances of their specific business processes and maximize R&D benefits unique to each industry.

Prior to joining GTM, Joe worked for BDO USA and PwC where his focus was on delivering specialized tax credits and incentives for companies of all sizes to reduce their annual tax bills. While at BDO, he developed innovative technology-based tools and solutions to help grow the practice's capabilities and consistently deliver a high quality of service to his clients. He has contributed to publications such as Bloomberg Tax and has presented on R&D tax credits to a variety of audiences.

Joe resides on Long Island, NY with his wife and goldendoodle. He enjoys spending time with his family and friends, playing golf, and exploring new places.


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**EDUCATION:** B.S. in Accounting from Penn State University

### CONTACT

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