



José María Monzó Blasco

Partner

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Tax

Family Business

Mergers & Acquisitions

Private Equity

Energy

Agribusiness and Food

Partner of the Tax Law practice, he has extensive experience in mergers and acquisitions and family businesses, particularly in the food, agribusiness, energy and environmental sectors. As part of his practice, he regularly advises various Spanish and foreign family groups, investment funds and listed companies, providing advice to boards of directors and family boards.

He has also participated in the creation, entry and consolidation of international groups in Spain dedicated to the health sector (such as Eurofins, medical or food analysis) or the veterinary sector (Anicura).

He also has extensive experience in advising business families on the consolidation of their businesses, the succession or sale of their business groups and the subsequent structuring of their assets, providing specialised advice adapted to the specific circumstances of the business family.

Experience

Partner of the Tax Law practice, he has extensive experience in mergers and acquisitions and family business, advising on a recurring basis various family groups, Spanish and foreign groups.

He has participated in several important transactions in the food and agri-food sector, such as the merger of all Coca-Cola bottlers in the Iberian Peninsula, which culminated in the creation of the company Coca-Cola

Iberian Partners, or the transfer of family-owned agricultural companies to investment funds. He has also participated in operations such as the sale of Ice Cream Factory Comaker to one of the investment funds managed by Portobello Capital, and its subsequent transfer to the Ferrero Group. He has also advised on transactions such as those carried out by the Lactalis Group with the Forlasa and Puleva Groups.

In the area of renewable energies, he has participated in various transactions with investors and venture capital entities in the creation of groups specialising in the management of these investments and in various investment and divestment operations. He regularly advises investment funds and international groups specialising in this field, as well as representative Spanish listed companies in the sector.

He has recently participated in the entry of energy companies in the recycling and environmental sector by taking stakes in specialised companies, such as Repsol's acquisition of a stake in Acteco Productos y Servicios.

In family business matters, he has specialised in the problems of generational transition and the different taxes involved, as well as the effects that this can have on companies, having participated in the generational handover of important family business groups, including succession planning for tax purposes and defence in inspection procedures.

He collaborates with entities such as the Catholic University of Valencia, giving classes in its master's degree programmes, and with specialised magazines such as Carta Tributaria.

Academic background

- Degree in Law from Universidad de Valencia.
- Master's Degree in Taxation and International Tax Consulting from the CEREM business school (Madrid).
- Course in Tax Treaties and Hybrid Instruments, International Bureau of Fiscal Documentation (IBFD).
- Course on VAT in International Trade, Centro de Estudios Financieros (CEF).
- Practical Taxation Course, Centro de Estudios Financieros (CEF).
- Refresher course at the London School of Business and Finance (LSBF), London.

He has also attended various courses and seminars relating to his specialist area.

Teaching activity

He is a regular lecturer on the Master's Degree in Tax Consultancy at the Catholic University of Valencia.

Memberships

Member of the Valencia Bar Association.

Publications

Co-author of the book *El cierre contable y fiscal del ejercicio 2013* published by Tirant Lo Blanc, specifically of the chapters on the consolidated tax regime and the mergers regime.

Numerous articles and pieces published, including most notably those published in recent years in the newspapers *Mediterráneo* and *El Economista.es*.