

# Joseph P. Chase

## Shareholder

West Palm Beach  
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## Practice & Industry Areas

- Corporate Law
- M&A and Private Equity
- Florida Counsel Services

## Education

- Vanderbilt University, J.D., 2007
- Harvard University, A.B., cum laude, 2002

## Bar & Court Admissions

- Florida, 2010
- Illinois, 2007

## Overview

Joseph Chase serves as head of Gunster's Mergers and Acquisitions and Private Equity team. He is dedicated to serving as a trusted advisor to business owners, private equity firms, companies in a wide range of industries, and other clients. He represents clients in connection with sales and purchases of businesses and general business and corporate matters.

Joe represents companies at every stage in their development. From working with entrepreneurs as they form new ventures to handling sales of companies with transaction values ranging from several million dollars to over \$1 billion, Joe is committed to working with business owners to identify the critical legal issues that matter to their companies, with a focus on implementing intelligent, efficient and practical solutions. He seeks to draw upon and leverage the experience of Gunster's nearly 300 lawyers to assist business owners and other clients with the wide variety of legal issues they encounter.

In addition to representing business owners and their companies, Joe also represents private equity firms in connection with purchase and sale transactions and myriad other legal needs.

Joe handles large transactions, negotiating against some of the world's largest and best-known law firms. In fact, he started his career with Kirkland & Ellis LLP in Chicago, Illinois prior to moving home to South Florida to be near his family—and joining Gunster—more than a decade ago. However, Joe is also able to handle smaller transactions efficiently. Joe is personally focused on offering clients a rare value proposition by delivering the experience, skill and sophistication of a large national firm and the value, client service and personal touch of a local or regional firm.

## Representative Matters

- Represented companies and private equity investors in connection with mergers and acquisitions, divestitures, equity investments and restructurings, including:
  - Numerous platform and add-on acquisitions for private equity funds
  - \$550 million sale of a national franchisor
  - \$500 million sale of a company in the employee benefits space
  - Florida counsel in connection with \$440 million leveraged acquisition of transportation infrastructure assets
  - Florida counsel in connection with \$325 million leveraged acquisition of a transportation services company
  - \$300 million sale of national franchisor
  - \$275 million sale of certain assets of a major consumer products company
  - \$250 million sale of an industrial materials manufacturer
  - \$250 million acquisition of an intellectual property-driven business in the entertainment space
  - \$200 million sale of a medical company
  - \$155 million sale of a software as a service (SaaS) company
  - \$150 million sale of a company that provides services to financial institutions
  - \$150 million sale of a health care company
  - Up to \$152 million sale of 1st Choice Aerospace Inc., an aviation supply chain management company
    - Media coverage: [Daily Business Review](#)
    - Media coverage: [Associated Press](#)
  - \$110 million sale of a medical device company
  - Florida counsel in connection with multiple nine-figure acquisitions of multi-location fixed base operators (“FBOs”)
  - Combination of major non-profit organizations
  - Florida counsel in connection with \$85 million leveraged acquisition of an HVAC contractor
  - \$1.2 billion sale of assets of a national retailer
  - \$80 million sale of a food products company
  - \$75 million sale of a technology company

- \$75 million acquisition by a national processor of recyclable materials
- \$75 million sale of an insurance brokerage business to a private equity fund
- \$65 million sale of a food products company
- \$60 million sale of a construction company
- \$60 million sale of an apparel company
- \$55 million sale of a manufacturer of agricultural materials
- \$55 million sale of a medical company
- \$50 million sale of a company in the executive recruiting space
- \$50 million sale of an importer and distributor of automotive parts
- \$48 million sale of a line of business producing beverage products
- \$35 million platform acquisition of a medical device company
- \$35 million sale of an agricultural company
- Multiple add-on acquisitions on behalf of a medical device and technology company
- Multiple add-on acquisitions on behalf of a healthcare IT and cybersecurity company
- \$25 million add-on acquisition of a medical device company
- \$25 million sale of a distributor of automotive parts
- \$23 million sale of an electronics company
- \$16 million sale of shares by a technology company
- Multiple sales of divisions of a publishing company
- \$12 million acquisition of a chain of health care clinics
- \$10 million add-on acquisition of a medical device company
- \$10 million sale of an exporter of food products
- Multiple acquisitions of insurance brokerages
- Joint venture for the development of a major residential and retail building in downtown West Palm Beach
- Multiple add-on acquisitions on behalf of a housewares company
- Acquisition of assets of a distressed pork production company
- Sale of a citrus packing house
- Represented entrepreneurs and investors in connection with venture capital investments
- Prepared, reviewed and negotiated various agreements between companies and their employees, including employment agreements with CEOs and other executives, assignments of inventions, non-compete agreements, confidentiality agreements, non-solicitation agreements and restricted stock agreements, option plans and agreements, phantom stock plans and agreements and other incentive equity documents
- Prepared, reviewed and negotiated numerous agreements between companies and their customers and suppliers
- Advised clients with respect to corporate governance matters
- Advised clients with respect to sweepstakes law compliance and drafted sweepstakes rules

## Honors

- Florida *Super Lawyers*, 2020-23
  - “Rising Star,” 2012-19
- *Jupiter Magazine*, “Top Lawyers,” Business/Corporate, 2023
- Chamber of Commerce of the Palm Beaches, “Young Professional of the Year”, 2019
- *South Florida Business Journal*
  - “South Florida Power Leader”, 2018
  - “40 under 40”, 2016
- Palm Beach Chamber of Commerce, “Young Professional of the Year”, 2017
- *Palm Beach Illustrated*, “Top Lawyers,” Business/Corporate, Mergers and Acquisitions Law, 2018-19, 2022-23
- *Boca Raton Observer*, “Top Lawyers,” 2022
- *Florida Trend*
  - “Up & Comer,” 2014, 2017
  - “Legal Elite,” 2021-22
- *Vanderbilt Law Review*, Editor-in-chief
- “Stanley D. Rose Book Award” for best written piece in the fields of Jurisprudence or Legal History
- “Vanderbilt Scholastic Excellence Award” in Legal Process and Criminal Law

## Publications & Presentations

- “Preparing for the Sale of a Business: Legal Due Diligence,” *Daily Business Review*, July 25, 2022
- “Letters of Intent in Connection with Sales of Businesses: The Seller’s Perspective,” presented to a joint session of the Martin County Bar Association’s Trial Lawyers Committee and Family Law Committee, presenter, May 12, 2022
- “Letters of Intent in Connection with Sales of Businesses: Key Considerations,” *Daily Business Review*, July 12, 2021
- “The How and When to Sell Your Business During a Pandemic,” *Gunster’s Family Wealth Compass*, November 2, 2020
- “Investment Banker Engagement Letters: Key Considerations,” *Daily Business Review*, September 4, 2020
- Moderator, “COVID-19 Business Assistance Webinar: Considerations in Connection with Reopening Your Business,” presented by the West Palm Beach Downtown Development Authority, May 2020
- Moderator, “COVID-19 Business Assistance Webinar: Responding to the Business Impact of COVID-19,” presented by the West Palm Beach Downtown Development Authority, April 2020
- “Will COVID-19 Result in a Material Adverse Effect Under M&A Acquisition Agreements?,” *Daily Business Review*, April 17, 2020

- Panelist, “Evaluating Risk- Valuing Private Companies,” Bonaventure Equity 2017 Annual Direct Investing Conference, November 2017
- Panelist, “Exit Strategies for Middle Market and Entrepreneurial Businesses,” BDO 2016 Year-End Accounting Tax Update, November 2016
- Panelist, “The Entrepreneurial Journey Series: Building and Monetizing Your Business and Personal Balance Sheet,” September 2016
- Moderator, “2016 Palm Beach County Housing Roundtable,” June 2016
- Panelist, “Building an Entrepreneurial Ecosystem in Palm Beach County: The Capital Environment,” Business Breakfast Series at The Phillips Point Club, October 2012
- Panelist, “Finding Angel, Venture and Expansion Capital for Your Business,” Business Breakfast Series at The Phillips Point Club, November 2011
- “Why Every Small Business Needs a Good Business Lawyer,” Local10.com, August 15, 2013
- “Small Business? You Should Think Big,” THELAW.TV, August 9, 2013
- “Small Businesses: Pay Attention to Taxes,” clickorlando.com, August 8, 2013
- “Taco Bell Hacking Incident Reminds Companies to Carefully Draft Sweepstakes Rules,” Gunster Blog, April 24, 2012
- “Can High End Manufacturing Save Florida’s Economy?” *Boardroom Brief*, March 2, 2012
- “Recent Article is Relevant to Florida’s Economic Development Strategy,” *Boardroom Brief*, December 14, 2011
- “Texting Dilemma for Reality TV,” *Law Technology News*, October 27, 2011
- “Deceptive Mortgage Advertisement Targeted by the FTC,” *Gunster Banking and Financial Services Alert*, August 12, 2011
- “Can Strong Protections of Private Property Rights Play a Role in Florida’s Economic Growth?” *Boardroom Brief*, July 28, 2011

## **Civic & Community Service**

- Chamber of Commerce of the Palm Beaches
  - Chairman, 2016-17
  - Executive Committee, 2014-18
  - Governmental Affairs Committee, 2010-present
- Forum Club of the Palm Beaches
  - President, 2021-22
  - Executive Committee, 2018-23
  - Board of Directors, 2013-23
  - Vice President, 2019-20
- Historical Society of Palm Beach County
  - Secretary, 2020-present
  - Executive Committee, 2018-present
  - Board of Governors, 2016-present

- South Florida Business Council
  - Chair, 2021
  - Chair-Elect, 2020
  - Executive Committee, 2019-23
- YMCA of the Palm Beaches
  - Board of Directors, 2014-present
  - Property Committee
- Palm Beach Chamber of Commerce, Board of Directors, 2018-20, 2022-present
- Economic Council of Palm Beach County, Emerging Leaders Program, 2017-23
- Friends of the West Palm Beach Public Library, Board of Directors, 2010-14
- Connect Florida Leadership Institute: Class V Leadership Institute Program, 2014-15
- Leadership Palm Beach County, Class of 2013
- Economic Forum of Palm Beach County
- Harvard Club of the Palm Beaches