

In his primary role as general counsel to regional businesses and non-profit organizations, Joe is recognized as a true listener and a valued part of the leadership teams of his clients. For more than 20 years, he has worked closely with clients by first understanding their goals and then helping them to quickly and creatively overcome any obstacles to achieve success. Joe provides general corporate counsel to a wide variety of clients. He has extensive experience with all aspects of initial corporate formations, transactions, joint ventures, mergers, consolidations, acquisitions, and reorganizations. In addition, he advises clients on technical requirements for compliance with federal and state tax regulations.

Besides serving as a trusted advisor, Joe is equally passionate about his work in the community, demonstrated by the numerous charitable organizations with which he volunteers his time.

Representative Experience

- Upstate Niagara Cooperative, in acquiring a cheese manufacturing facility from Kraft Heinz in the Southern Tier that allowed Upstate to enter the cheese market for the first time and provided a home and productive use for the tremendous amount of milk its members in our region are producing.
- Trillium Health, as general counsel in many matters including the integration of AIDS Rochester and Community Health Network following the merger that created the unified Trillium Health entity, formation of a foundation, formation of a joint venture to expand pharmacy services, physician practice acquisitions, and a wide range of regulatory matters to ensure the delivery of care to underserved populations in our community.
- The Max and Marian Farash Charitable Foundation, since 2007 consistently working with the trustees of the Foundation, guiding the monetization of the Foundation's real estate holdings, establishing the governance, related policies and grant-making infrastructure to ensure that the wishes of its founders Max and Marian Farash are honored through its mission to benefit organizations in the Greater Rochester area and Israel.
- Alleson of Rochester, coordinating a team of family shareholders, financial advisors, and HSE lawyers, closing a transaction that paired Alleson with another sports apparel manufacturer and which strengthened both companies, maintained jobs in the region, and delivered significant value to the stakeholders.

Professional and Civic Affiliations

- Immediate Past Chair, Board of Directors, Friendly Home
- Secretary, Board of Directors, Foodlink



JOSEPH G. CASION

PARTNER

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Admissions

New York

Education

Syracuse University College of Law, J.D., *cum laude*University of Rochester, B.A., History, *magna cum laude*

- Secretary, Board of Governors, Al Sigl Foundation
- Member, Monroe County Bar Association
- Member, New York State Bar Association
- Past Chair, Board of Directors, Empire Justice Center
- Past Chair, Community Investment Executive Team, United Way of Greater Rochester
- Past Secretary, Board of Directors, Grantmakers Forum of New York

Honors and Awards

- Named by *The Daily Record* as one of Rochester's Attorneys of the Year, 2017
- Selected by his peers for inclusion in *The Best Lawyers in America*® in the field of Closely Held Companies and Family Businesses Law and Corporate Law
- Selected to the Upstate New York Super Lawyers Rising Stars list, 2013-2014
- Recipient, "Forty Under 40" Award, *Rochester Business Journal*, 2011
- Justinian Society, Phi Beta Kappa

Publications

- "New Non-Profit Law Lifts Burdens, Adds Oversight," *Rochester Business Journal*, June 2014
- "New York Enacts Not-for-Profit Corporation Law Reform," LexisNexis® Emerging Issues Analysis, January 2014
- "New York Limits Executive Compensation and Administrative Expenses at State-Funded Service Providers," LexisNexis® Emerging Issues Analysis, July 2013
- "Benefit Corporations Now Authorized in New York—The Formalization of Corporate Social Responsibility," LexisNexis® Emerging Issues Analysis, March 2012
- Contributing Author, *White New York Business Entities*, Not-for-Profit Corporation Law

Presentations

- "Tax Reform for Exempt Organizations: 10 Things You Need to Know" webinar, June 14, 2018
- "Tax Reforms Impact of Higher Education," Buffalo College & University Spring Educational Breakfast Series presented by The Bonadio Group, June 6, 2018
- "Architects/Engineers Breakfast Briefing: Design Professionals Corporations and Ancillary Businesses," Harter Secrest & Emery LLP and Poole Professional, June 7, 2017
- "Trends in Non-Profit Law Compliance," Harter Secrest & Emery Higher Education Institute, August 2, 2016
- "Executive Compensation Strategies for Non-Profits," Harter Secrest & Emery and the Burke Group, May 18, 2016
- "How to Build an Effective Board," Greater Rochester Enterprise's Eyes on the Future Radio Show, WHAM 1180, May 2016
- "Non-Profit Revitalization Act," Greater Rochester Enterprise's Eyes on the Future Radio Show, WHAM 1180, June 2014

