Tax & Employee Benefits

Businesses turn to us for precise guidance on complex and continually changing tax laws.

Our Tax & Employee Benefits team doesn't just focus on the tax aspects of a client's business—we take the time to understand our clients' business and legal concerns, working with them to identify objectives and structuring a plan to efficiently accomplish them. The depth of our practice is reflected in the many tax areas and issues we address. We deliver solutions for everything from sophisticated forward and reverse like-kind exchange transactions to redevelopment matters that help communities flourish.

Employee Benefits & Executive Compensation

Our Employee Benefits lawyers handle a broad range of ERISA and employee benefits matters. Our clients range from large, publicly traded companies to midcap and startup companies and tax-exempt and not-for-profit entities. In our frequent role as outside ERISA and employee benefits counsel, we advise on all aspects of plan qualification rules under the Internal Revenue Code, plan administration and compliance issues under ERISA and the Affordable Care Act (ACA), as well as COBRA compliance and HIPAA privacy requirements. We design and help our clients administer employee pension and welfare benefit plans and other compensatory arrangements. We guide plan sponsors and their boards of directors or trustees, as well as plan administrative and investment committees, through a wide range of fiduciary responsibility and liability issues under ERISA.

We also advise plan sponsors and plan administrative committees in participant claims for benefits in accordance with the Department of Labor (DOL) claims procedure regulations and actions filed under ERISA §502 in federal court, and have presented client education programs on a variety of issues.

We submit requests for the IRS for compliance statements and closing agreements under the IRS Employee Plans Compliance Resolution System, including component programs such as the Voluntary Correction Program. We request and receive IRS private letter rulings and DOL advisory opinions, and maintain good relationships with IRS and DOL personnel. We also advise clients in dealing with the Pension Benefit Guaranty Corporation regarding its defined benefit pension plans.

We also bring practical business sense to bear on the compensation issues that arise in highly competitive markets. We counsel on executive retention, compensation and severance, change-in-control situations and golden parachute issues, deferred compensation, and the design and operation of incentive plans, equity-based plans and similar arrangements.

Federal / State Tax Controversies & Litigation

Our Tax Team skillfully represents clients in federal and state tax controversies at the audit, administrative and appeal levels. We are experienced in the procedural and strategic aspects of litigation and the complexities of tax law. While we seek to resolve controversies via administrative appeal or negotiated settlement, we also have deep experience effectively litigating tax matters. We represent clients at the IRS audit and administrative appeal levels; before state tax, trial, appellate and state supreme courts; and before the United States Tax Court, District Courts and Court of Claims.

Multistate Tax

We represent clients in tax audits and before administrative appeal boards across the country and have extensive experience advising clients on multi-state tax planning strategies and state tax effects of mergers, acquisitions, restructurings and ongoing business operations. We recognize the expanding importance of state tax issues and the need for clients to address them on a multi-state basis. We handle matters involving corporate income, franchise, personal income and sales and use taxes, as well as unemployment compensation and unclaimed property (escheats) issues.

Real Property Tax Planning & Appeals

Property tax assessments across the nation have risen exponentially in recent years, creating a greater burden for businesses, developers, agencies, and financial institutions. Our team of Real Property Tax Planning & Appeals lawyers are adept at reducing property assessments, negotiating tax abatements and exemptions for qualified taxpayers, and securing incentive packages for relocating businesses. Should an appeal become necessary, we are responsive and efficient in filing claims, dealing with assessors, and appearing before tax boards and courts. We have handled nationally prominent property tax cases, establishing new legal precedents.

Tax Exempt & Nonprofit Entities

Tax exempt and nonprofit organizations face a unique set of challenges as they strive to provide excellent services and care while having to control costs. We help our clients by delivering an efficient, interdisciplinary approach to our clients' exemption, legal, regulatory, and business issues. Our lawyers have a long, institutional track record of working with tax-exempt and other nonprofit entities, negotiating business transactions, and resolving disputes before administrative agencies and in court. Our focus includes implementing best practices for nonprofits, counseling on tax and fiduciary issues, and creating endowment funds that expand fundraising opportunities. We have extensive experience representing tax-exempt organizations in all phases of operations and assisting individuals and businesses in making charitable contributions to such organizations.

Tax Planning & Structuring

We help clients develop and implement tax-planning strategies to help minimize tax liabilities on their important transactions, from advising on choosing the appropriate entity for a closely-held business to handling complex recapitalizations prior to an initial public offering. Included in our list of capabilities is helping clients identify and structure state and federal tax credit opportunities, such as the Qualified Opportunity Zones program.

Representation begins as early as a letter of intent for structuring a proposed transaction and continues with intensive scrutiny of the provisions of any definitive documentation to ensure a successful outcome for each matter. Clients range from Fortune 500 companies to emerging growth enterprises.

Representative Matters

New Jersey hospital—Community Service Contribution Agreement

Negotiated a five-year Community Service Contribution Agreement with a New Jersey city on behalf of a hospital's numerous properties. The city had removed the tax exemption on 37 hospital properties within the city and placed each on the taxable assessment rolls for the 2016 through and including 2020 tax years. The total taxes due on the properties totaled more than $20 million, but the Community Service Contribution Agreement limited the total payment by the hospital to $6 million, payable over a five-year period. In addition, the city owed the hospital a refund of overdue sewer and water charges totaling $1.8 million, which the city is now crediting back to the hospital against sewer and water charges due on its hospital property for the next five years. The total savings to our client is more than $15 million, including the refund of overpaid sewer and water charges.

International chemical company—Consolidation of legacy plans

Played an instrumental role in helping an international chemical company achieve its key objective of consolidating several of its "legacy" defined benefit pension plans into a single plan, resulting in administrative and cost efficiencies. In these spinoff and merger transactions, we helped establish a newly defined benefit pension plan into which two "legacy" defined benefit pension plans were merged and a spinoff population from a third "legacy" defined benefit pension plan were consolidated into a single plan. At the same time, the company consolidated trustee and investment management services and established a single master trust with a new trustee.

International container shipping company—Establishing ERISA plan fiduciary committee

Advised and assisted a large international container shipping company in establishing an ERISA plan fiduciary committee with oversight responsibility for the company sponsored 401(k) plan, including preparation of committee charter, appropriate board resolutions appointing the committee members, attendance at committee meetings, and the selection of an ERISA 3(21) investment consultant through a rigorous request for proposal process.

Not for profit testing and assessment organization—Vendor consolidation

Advised a large not for profit testing and assessment organization in a significant consolidation of trustee, custodian, investment platform provider, and recordkeeping services with a single vendor with respect to its 403(b) plan and money purchase pension plan, a portion of whose assets were held in a group annuity contract, achieving cost savings for the participant of the plans. We negotiated new trustee, recordkeeping, custodian and related administrative service agreements with both the old and the new vendor, prepared plan amendments, board approval documentation, and reviewed participant communications.

Alerts

Beneficial Ownership Reporting under the Corporate Transparency Act—What to Do Now?, Client Alert, 11.30.2023

Enhanced Opportunities to Benefit from the Employee Retention Credit, Tax & Employee Benefits Alert, 5.12.2021

Employee Benefits Provisions of the Consolidated Appropriations Act, 2021, Tax & Benefits Alert, 1.14.2021

Benefit Plan Deadlines Extended, Enforcement Standards Relaxed by DOL and IRS During Pandemic, Tax & Benefits Alert, 5.1.2020

IRS and PBGC Issue Relief Extending Certain Employee Benefit Plan Deadlines Due to COVID-19 Pandemic, Coronavirus Legal Advisory, 4.22.2020

IRS Issues Guidance on Key Business Tax Provisions of CARES Act, Coronavirus Legal Advisory, 4.21.2020

IRS Extends More Tax Deadlines in Notice 2020-23, Coronavirus Legal Advisory, 4.15.2020

Nonqualified Deferred Compensation Plan Sponsors: COVID-19 Pandemic Considerations, Coronavirus Legal Advisory, 4.14.2020

McCarter Attorney Leads Efforts for Further Relief from the IRS, Coronavirus Legal Advisory, 4.9.2020

CARES Act Implements Changes to the Tax Code; Provides Economic Relief in the War against COVID-19, Coronavirus Legal Advisory, 3.30.2020

IRS's Relief to Taxpayers Affected by COVID-19 Presents Rare Opportunities for Taxpayers with Unresolved Tax Issues, Coronavirus Legal Advisory, 3.30.2020

Employee Benefits Provisions of the CARES Act, Coronavirus Legal Advisory, 3.28.2020

Deferral of State Income Tax Filings and Payments, Tax & Benefits Alert, 3.25.2020

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New Jersey Property Tax Appeal Deadline Extended, Tax & Benefits Alerts, 3.24.2020

THE SECURE ACT: New Legislation Brings Major Changes to Retirement Plan Benefits and Administration, Tax & Benefits Alert, 2.26.2020

Thousands of Virtual Currency Owners May Be Subject to Back Taxes, Penalties, and Interest, Tax & Benefits Alert, August 1.2019

IRS Issues New Proposed Regulations on Qualified Opportunity Zones, Impact Investing Alert, 5.15.2019

IRS Proposed Regulations Relax Requirements for Hardship Distributions, Tax & Benefits Alert, 1.9.2019

IRS Announces Retirement Plan Limits for 2019, Tax & Benefits Alert, 11.8.2018

IRS Issues Highly-Anticipated Guidance on Qualified Opportunity Zones, Impact Investing Alert, 11.5.2018

New Jersey Biotechnology Task Force Recommends Angel Investor Tax Credit Program Expansion, August 10.2018

Tax Reform: Key Implications for U.S.—Based Businesses, Tax & Benefits Alert, 2.13.2018

No Further Delays for Enhanced Disability Claims Procedures: ERISA Plans Facing April 1, 2018 Compliance Date, Tax & Benefits Alert, 2.9.2018

New Tax Law Provisions Encourage Investments in Low-Income Communities, Impact Investing Alert, 2.6.2018

New Jersey Property Tax Appeal Time, Tax and Benefits Alert, 1.17.2018

IRS Announces Retirement Plan Limits for 2018, Tax & Benefits Alert, 10.24.2017

New Jersey Property Tax Appeal Time, Tax & Benefits Alert, 1.8.2017

IRS Permits Self-Certification for Late Rollovers to Qualified Retirement Plans, Tax & Benefits Alert, 10.4.2016

IRS Issues Welcome Guidance on Nonqualified Deferred Compensation Plans Maintained by Tax-Exempt Entities, Employee Benefits Alert, 7.29.2016

Private Equity Funds Liable for Portfolio Company's Pension Obligations, Employee Benefits Alert, 4.6.2016

Pension Plan Sponsors Beware: The Department of Labor Is Investigating Plans That Fail to Locate and Pay Benefits to Terminated Vested Participants, Employee Benefits Alert, 3.21.2016

New Jersey Property Tax Appeal Time, Tax & Benefits Alert, 1.29.2016

Tax Alert: Qualified Small Business Stock Tax Incentives Made Permanent, Tax & Employee Benefits Alert, 12.22.2015

Changes in Retirement Plan Limitations for 2016, Tax & Employee Benefits Alert, 10.14.2015

A Warning to 401(k) Plan Sponsors Relying on Third-Party Administrators (TPAs), Tax & Benefits Alert, 4.13.2015

Employers: Properly Administer Nonqualified Deferred Compensation Plans, or You May Be Held Liable to Participants for Adverse Tax Consequences, Tax & Benefits Alert, 2.20.2015

Changes in Retirement Plan Limitations for 2015, M&E Tax and Employee Benefits Alert, 11.4.2014

IRS Issues Guidance on Recognition of Same-Sex Marriage Under Tax-Qualified Retirement Plans, Tax and Employee Benefits Alert, 4.10.2014

U.S. Appeals Court Affirms Judgment Against 401(k) Plan Fiduciaries for Excessive Recordkeeping Fees, Tax and Employee Benefits Alert, 3.31.2014

Final Rules Implementing Employer Shared Responsibility Provisions of the Affordable Care Act (ACA) Provide Transition Relief for 2015, Tax and Employee Benefits Alert , 2.14.2014

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Answers to your Burning R&E Expenditure and R&D Tax Credit Questions, Bloomberg Law, Tax Management Memorandum, August 1.2022

Is New Jersey's Indefinite Extension for Tax Assessments Constitutional?, Tax Notes State, 5.27.2022

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The Significant, Yet Often Ignored, Tax Consequences of Moving Out of New York and the US, New York Law Journal, 2.3.2022

Trust and Estate Implications Involving Potentially Incapacitated Persons, New Jersey Law Journal., 4.8.2021

Taxpayers That Paid the Net Investment Income Tax or the Additional Medicare Tax Should Consider Filing Protective Claims for Refund, Westlaw Journal, August 17.2020

Penalties Against, and Investigations of, Tax Return Preparers, Promoters, and Appraisers, TAXES – The Tax Magazine, 5.1.2020

Digital Evidence in Civil and Criminal Tax Cases, Journal of Tax Practice & Procedure, 10.1.2019

Tesla's Stock Option Grant to Elon Musk: Part 2, New York Law Journal, 5.22.2018

Tax Consequences of Cryptocurrency Transactions and Correcting Historical Noncompliance, New Jersey Law Journal, 3.30.2018

New Jersey Taxes, Guidebook to (2018), CCH Incorporated, 12.1.2017

Books

Sales & Use Tax Deskbook, American Bar Association, 4.26.2022

Effectively Representing Your Client Before the IRS – Chapter 10, ABA Section of Taxation, 10.6.2021

Qualified Appraisals and Qualified Appraisers: Expert Tax Valuation Witness Reports, Testimony, Procedure, Law, and Perspective, John Wiley & Sons, Inc., 12.1.2017

Tax Practitioner's Guide to Identity Theft, CCH Inc., 1st ed. 2015; 2d ed. 2016, 1.1.2015

Speaking Engagements

Recent Jurisprudence and Legislative Review, Institute for Professionals in Taxation (IPT), 11.6.2023

Litigating a Remote Trial in United States Tax Court, ABA Section of Taxation's 2023 May Meeting, 5.5.2023

Legionella -Overview and Personal Injury and Premises Liability Risk, Ramboll Seminar, 5.4.2023

Tax Court Decisions, Society of Professional Assessors, 4.14.2023

Ethical Considerations in Preparing Tax Return Disclosures, ABA Section of Taxation, 2.10.2023

Civil Tax Workshop: It's a World of Depositions: Discovery in the Tax Court and the Federal District Courts, ABA's 2022 National Institute on Criminal Tax Fraud and Tax Controversy, 12.12.2022

Keeping Your Clients Out of Hot Water: Drafting Effective Tax Return Disclosures, UT Law Annual Taxation Conference, 12.1.2022

Avoiding IRS Challenges to Your Client's Estate Plan, New England IRS Representation Conference, 11.18.2022

State Taxes and Estate Planning: Who Said Your Estate or Trust Was Non-Taxable?, New York University School of Professional Studies, 7.13.2022

The Future of the Office Market in a Post Pandemic World, Rotary Club of Weston and Wayland, 4.7.2022

Technology's Impact on Criminal Tax Enforcement: IRS Cybercrimes 2022, Federal Bar Association's Annual Tax Law Conference, 3.4.2022

Cryptocurrency: Where Are We Today?, ABA's 2021 National Institute on Criminal Tax Fraud and Tax Controversy, 12.10.2021

Foreign Forms 101: The Forms Every Practitioner Should be Familiar With, New England IRS Representation Conference, 11.18.2021

Evidence in Trust and Estate Litigation, New Jersey Institute for Continuing Legal Education , 08.24.2021

New Fiduciary Roles in New Jersey Directed Trustees, Trust Protectors and Others, NJICLE 2021 Estate Planning Summer Institute, 7.30.2021

Exploring Careers in Tax Law, Morehouse/Spelman Pre-Law Society, 4.15.2021

Cannabis Is Going National: Opportunities and Pitfalls, Federal Bar Association's Annual Tax Law Conference, 3.5.2021

Cryptocurrency: Current Tax and Bank Secrecy Act Regulatory and Enforcement Environment, Celesq, 2.26.2021

Tax Collection in the Time of COVID-19, ABA Section of Taxation, 4.9.2020

The Age of Promoter Penalties: Fighting the Good Fight, ABA Section of Taxation's 2020 Midyear Meeting, 2.1.2020

Collection of Foreign Tax Judgments: When Your Other Problems Come Home, ABA Section of Taxation's 2020 Midyear Meeting, 1.31.2020

9th Annual New Jersey Tax Controversy Forum, Seton Hall Law School, 1.24.2020

The Changing Word of Evidence, ABA Section of Taxation's 2019 National Institutes on Criminal Tax Fraud and Tax Controversy, 12.12.2019

Alternative and Combined Planning Strategies for Like-Kind Exchanges & Qualified Opportunity Zones, Middlesex County Bar Association, 11.26.2019

Making the Most of Tax Incentives, Bloomberg Tax Leadership Forum, 11.19.2019

Recent Events Affecting Qualified Opportunity Zones and Section 1031 Like-Kind Exchange Strategies, Bryn Mawr Trust Breakfast Seminar, 9.11.2019

Attorney Ethics in Local Property Taxation, Association of Municipal Assessors of New Jersey's June Conference, 5.27.2019

Advising Noncompliant Taxpayers: When is the Updated Voluntary Disclosure Practice the Best Choice?, NYU's 11th Annual Tax Controversy Forum, 5.20.2019

IRS Programs to Correct Noncompliance, Domestic and International Tax Controversy Update, 5.19.2019

4th Annual Opportunity Zones Conference, Mid Atlantic Real Estate Journal, 5.31.2019

The Obligation to Report Tax-Related Misconduct, ABA Section of Taxation's 2019 May Meeting, 5.10.2019

Statutes of Limitations in Tax Litigation: Friend or Foe?, ABA Section of Taxation's 2019 May Meeting, 5.9.2019

Qualified Opportunity Zones, 11th Annual Federal Tax Law Symposium (NJICLE), 5.3.2019

The Impact of the TCJA on the Taxation of Individuals, Federal Bar Association's Annual Tax Law Conference, 3.8.2019

Real Estate Market Forecast "All In" For Newark, Newark Regional Business Partnership (NRBP), 3.7.2019

The IRS's Updated Voluntary Disclosure Practice, McCarter & English, LLP, 2.26.2019

The Role of Form 4340 in Tax Litigation, ABA Section of Taxation's 2019 Midyear Meeting, 1.18.2019

Passport Revocation: Key Principles and Strategies for Administrative Resolution, ABA Section of Taxation's 2019 Midyear Meeting, 1.18.2019

IRS Collection: More Than Money at Stake, ABA Section of Taxation's 2018 National Institutes on Criminal Tax Fraud and Tax Controversy, 12.14.2018

Qualified Opportunity Zones, Rutgers Annual Tax Alumni Event, 11.9.2018

Impact Investing – Benefiting Communities and Your Bottom Line, 11.8.2018

New Tax Basis Consistency Requirements, National Business Institute, 11.7.2018

The Impact of Real vs. Personal Property—How It Can Be Used to Maximize Tax Savings, Institute for Professionals in Taxation's Property Tax Symposium, 11.5.2018

Presenting Complex Legal Concepts to a Lay Tribunal, Institute for Professionals in Taxation's Property Tax Symposium, 11.5.2018

Tax Aspects of Cryptocurrency, New Jersey Society of CPAs, 10.30.2018

Funding Marital and Charitable Trusts—Tax and Non-Tax Considerations, Advanced Estate Administration Program - New Jersey Institute of Continuing Legal Education, 10.10.2018

Tax Issues in M&A, New Jersey M&A Conference, 9.28.2018

Fiduciary Litigation Update: Planning & Administration Techniques that Stand the Test of Time, New Jersey Law Center, New Brunswick, NJ, 9.20.2018

The Residential Sector: Analysis of Tenant Demand, Leasing Rates and the Shift from Renter to Homeowner (or Homeowner to Renter), CAPRE's Third Annual Newark CRE Summit, 7.19.2018

Audits of Taxpayers with Foreign Income and Assets, 2018 International Tax Enforcement Program, 5.20.2018

The New Tax Act: The 20 Percent Deduction for Pass-Through Entities under the New IRC Section 199A, 79th Semi-Annual Tax and Estate Planning Forum (NJICLE), 5.13.2018

The Definitive Tax Cuts & Jobs Act Seminar, New Jersey Chapter of the National Association of Tax Professionals (NATP), 5.17.2018

Communicating the Wealth Plan: How, When and Why to Lift the Veil on Your Estate Plan, 30th Annual American Bar Association Real Property, Trust & Estate Law Section Spring Symposia, 5.11.2018

It's a World of Tears and a World of Fears: Crisis Management of Estates, 30th Annual American Bar Association Real Property, Trust & Estate Law Section Spring Symposium, 5.10.2018

Key Provisions of the 2017 Federal Tax Reform Legislation, 10th Annual Federal Tax Law Symposium, 5.4.2018

Collection Issues Affecting Estates, Donors, and Donees, ABA Section of Taxation's 2018 Midyear Meeting, 2.9.2018

Tax Cuts and Jobs Act of 2017 – How the New Tax Bill will Affect You, Your Clients and Your Practice, NJICLE, 1.31.2018

President Trump's Tax Reform Law (What It Means to You and Your Business), Commerce and Industry Association of New Jersey (CIANJ), 1.30.2018

Tax Cuts and Jobs Act of 2017 – How the New Tax Bill will Affect You, Your Clients and Your Practice, NJICLE, 1.29.2018

Impact Symposium, New Jersey Business and Industry Association (NJBIA), 12.5.2017

In the Zone with Roseland and Canoe Brook: How Industry Giants are Viewing the Gubernatorial Race and Federal Tax Reform and Changes They May Bring, CAPRE's 7th Annual New Jersey Apartment Summit, 11.30.2017

Gift Tax Returns and IRS Examinations, 2017 New England IRS Representation Conference, 11.17.2017

Third Annual Newark CRE Summit, CAPRE, 7.27.2017

Effectively Presenting Valuation Discounts in Pre- and Post-Filing Tax Controversies, National Association of Certified Valuators and Analysts, 7.20.2017

Voluntary Disclosure and Examination Update, 2017 International Tax Enforcement Program, 5.14.2017

Civil Penalties, Hackensack Community College, 5.6.2017

Transitioning from Law Clerk to Associate – Professional Tips to Make it a Success for All Young Lawyers: An Ethics and Professionalism Course, 2017 Annual Meeting and Convention: New Jersey State Bar Association, 5.17.2017

Above the 20 (Accuracy-related Penalties Imposed at Rates Greater than 20%), ABA Section of Taxation, 5.13.2017

Recent Developments in Collection, Bankruptcy, and Workouts, ABA Section of Taxation's 2017 May Meeting, 5.12.2017

Common Tax Traps Involving Partnerships and LLCs, NJICLE 9th Annual Federal Tax Law Symposium, 5.5.2017

Audits of Estate Tax Returns and Protecting the Fiduciary Client, Estate and Financial Planning Council of Central New Jersey, 4.20.2017

New Partnership Tax Audit Rules, Tax, Trusts & Estates Committee of the Essex County Bar Association, 4.19.2017

Tax Appeals from the Plaintiff's Perspective, Society of Professional Assessors Seminar, 4.7.2017

New Partnership Audit Rules, NJICLE 2017 Business Law Symposium, 4.7.2017

The Education Equation – Strategies for Retaining New Jersey's Future Workforce, NJBIA, 3.21.2017

Practical Tips on timing, commencement & calculation of PILOT, including consideration of overlap between Title 54 and the Long Term Tax Exemption Statute, New Jersey Institute for Continuing Legal Education (NJICLE), 2.10.2017

Defending the Absolutes: Litigation in the United States District Courts, ABA Section of Taxation, 1.20.2017

Tax Court 101: Expert Witnesses, ABA Section of Taxation's Midyear Meeting, 1.19.2017

New Partnership Audit Rules: What Accountants Need to Know, The CPA Club of Bergen County, 12.15.2016

Litigating Property Tax Appeals for Hospitals, Assisted Living Facilities and Nursing Homes, Chamber of Commerce Southern New Jersey Health Issues Committee, 12.13.2016

IRS Collections—Strategies for Protecting Your Clients' Rights, ABA Section of Taxation's 2016 National Institutes on Criminal Tax Fraud and Tax Controversy, 12.8.2016

Annual Tax Seminar, New Jersey CPA Society, 12.3.2016

New Partnership Audit Rules: What Accountants Need to Know, Annual Tax Seminar of the Morris/Sussex Chapter of the New Jersey Society of Certified Public Accountants, 12.1.2016

New Jersey Tax Conference, New Jersey CPA Society, 11.15.2016

From the Ground Up: The Development of a Commercial Real Estate Project, New Jersey Institute for Continuing Education, 11.10.2016

Chamber Seminar Series – Property Tax Appeals Panel, Worcester Regional Chamber of Commerce, 11.8.2016

Valuation in Tax: Key Discounts Every Valuation Professional Should Know, AICPA, 11.7.2016

Grist to the Windmill: Negotiation Advice from Successful Women Lawyers, New Jersey State Bar Association Mid-Year Meeting, 10.26.2016

Unanticipated Consequences of Late Filing, Amended Return Filings and Quiet Voluntary Disclosures and Best Practices for Penalty Mitigation, UCLA 2016 Annual Tax Controversy Institute, 10.25.2016

Pretrial Practice & Procedure, ABA Section of Taxation, 9.29.2016

Hot Topics in Nonprofit and Charitable Organization Law, NJSBA Business Law Section Board, 5.23.2016

Transitioning from Law Clerk to Associate—Professional Tips to Make it a Success for All Young Lawyers—An Ethics and Professionalism Course, NJ State Bar Association 2016 Annual Meeting and Convention, 5.18.2016

Tax Court Cases Every Practitioner Should Know, ABA Section of Taxation's 2016 May Meeting, 5.5.2016

New Partnership Tax Audit Rules, ICLE 8th Annual Federal Tax Law Symposium, 4.28.2016

Understanding Allocation Provisions in LLC Operating Agreements-Primer for Business Lawyers, Business Law Symposium (NJSBA/NJICLE), 4.8.2016

Property Tax Abatements, American Planning Association - New Jersey Chapter, 1.29.2016

Litigation Before the United States Tax Court, ABA Section of Taxation's 2016 Midyear Meeting, 1.28.2016

NJ State Tax Law & Case Update, New Jersey Society of Certified Public Accountants Annual Tax Seminar, 12.12.2015

Hot-Tubbing: How to Get to the Truth From Expert Testimony, ABA Section of Taxation’s 2015 National Institutes on Criminal Tax Fraud and Tax Controversy, 12.10.2015

Capital Gain Exclusion for Qualified Small Business Stock: What You Need to Know, Annual Tax Seminar of the Morris/Sussex Chapter of the New Jersey Society of Certified Public Accountants, 12.3.2015

Valuation in Tax: What Non-Attorneys Should Know About Litigating Valuation Cases, AICPA & CIMA Forensic & Valuation Services Conference, 11.9.2015

New Jersey & Tri-State Net Lease 360: Will Net Lease Deals Remain a Safe-Haven for Investors Despite Potential Fluctuations in the Capital Markets?, The New Jersey Net Lease Summit, 11.4.2015

International Tax & Reporting for Cross-Border Transactions, Ramapo College of New Jersey, 10.22.2015

Transactional Planning, Tax Executives Institute, Inc. (TEI), 9.25.2015

Understanding Valuation Discounts, ABA Section of Taxation’s 2015 Fall Meeting, 9.18.2015

Tax Traps Involving Partnerships & LLCs: What In-House Counsel Need to Know, Association of Corporate Counsel New Jersey Chapter's (ACCNJ) All Day Annual CLE Conference, 9.18.2015

Drafting Strategies for Partnership Allocation Provisions, Bergen Tax Study Group, 9.16.2015

Litigation Before the United States Tax Court, New York County Lawyers’ Association, August 20.2015

Property Tax Appeals in Newark, The Newark CRE Summit, 7.16.2015

Drafting Strategies for Partnership Allocation Provisions, Middlesex County Bar Association Tax Committee CLE Seminar, 5.23.2015

No Pain—Big Gain: Assisting Self-Represented Petitioners at Calendar Call, ABA Section of Taxation’s 2015 May Meeting, 5.7.2015

Capital Gain Exclusion for Qualified Small Business Stock: What You Need to Know (Even if You Never Represent C Corporations), NJICLE 2015 Federal Tax Law Symposium, 4.30.2015

Allocation Provisions in LLC Operating Agreements—What Business Lawyers Need to Know, New Jersey Institute for Continuing Legal Education in cooperation with the NJSBA Business Law Section, 4.17.2015

Real Estate Market Forecast: Newark on the Move, 3.4.2015

Property Tax Issues East of the Mississippi, COST 2015 Property Tax Workshop, 1.20.2015

Wired and Wireless – Property Tax Issues in the Communication Industry, COST 2015 Property Tax Workshop, 1.20.2015

Ask the Experts Discussion Panel, COST 2015 Property Tax Workshop, 1.20.2015

Property Tax Issues in the Energy Industry, COST 2015 Property Tax Workshop, 1.20.2015

Property Tax Relief Via Incentives and Abatement Programs, COST 2015 Property Tax Workshop, 1.20.2015

New Jersey Sales and Use Tax, New Jersey Society of Certified Public Accountants, Passaic County Chapter, 1.8.2015

New Jersey Sales and Use Tax Updates, New Jersey Society of Certified Public Accountants, Union County Chapter, 12.13.2014

Litigating Valuation Issues in Tax Cases, ABA Section of Taxation's 2014 National Institutes on Criminal Tax Fraud and Tax Controversy, 12.11.2014

New Jersey Sales and Use Tax and Nexus, New Jersey Taxation Conference of the New Jersey Society of Certified Public Accountants, 12.9.2014

Tax Traps Involving Partnerships and LLCs, Annual Tax Seminar of the Morris/Sussex Chapter of the New Jersey Society of Certified Public Accountants, 12.5.2014

Tax Traps Involving Partnerships and S Corporations, CPA Club of Northern NJ, 11.20.2014

Use of Experts in Property Tax Litigation, CLE Seminar - Verizon Headquarters, 11.20.2014

Property Tax Appeal Update: Strategies for Reducing Your Assessment, Choice Hotels Owners Council Town Hall, 11.19.2014

New Jersey Sales & Use Tax Updates, New Jersey Association of Public Accountants, 9.23.2014

ERISA Plan Governance & Fiduciary Considerations for Employers, NJ Corporate Counsel Association's 12th Annual All Day CLE Conference, 9.19.2014

Hotel Property Tax Appeals – Recent Developments to Benefit the Bottom Line, 36th Annual New York University International Hospitality Industry Investment Conference, 5.2.2014

Legal Issues in Charitable Giving, Graham-Pelton Consulting Program, 5.22.2014

Much Ado About Nothing: Tax Planning for Disregarded Entities, 2014 Federal Tax Law Symposium, 5.2.2014

Understanding IRC Section 409A and How to Draft Employment and Severance Agreements That Comply, 2014 Business Law & Corporate Counsel Symposium, 4.4.2014

Redevelopment in New Jersey: Strategies for Success, 4.3.2014

Getting the Most Out of the Economic Opportunity Act, New Jersey Future Redevelopment Forum 2014, 3.14.2014

Real Estate Market Forecast, Newark Regional Business Partnership, 3.4.2014

Hot Tips in Taxation 2014, New Jersey Institute for Continuing Legal Education, 1.29.2014

Webinars

Adding Value: Property Taxes Reduced, SIOR NYC, 4.17.2024

Retool Your Practice – Will Drafting Fundamentals, NJICLE, 11.9.2023

Estate Planning Primer, NJICLE, 5.5.2023

Contractual Aspects of Purchase Price Allocations, NJICLE, 11.16.2022

Will Drafting Fundamentals for the Covid Crisis and After, NJICLE, 2.22.2022

How to Make Partner and Rainmaking 101, South Asian Bar Association of New Jersey., 10.19.2021

Taxes Going Up…Yikes!! What To Do Now?, Exit Planning Institute, 7.20.2021

Estate Planning Primer, NJICLE, 4.19.2021

The Way Forward for Newark Real Estate Development: Real Estate Market Forecast 2021, Newark Regional Business Partnership, 3.3.2021

NJ Tax Court: Bench-Bar Discussion, 4.29.2020

1031 Like-Kind Exchanges – Reverse Exchange Strategies, REFI Webinar, 2.7.2017

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Six Months In, Lawyers Still Grappling With New Tax Court System, Tax Notes, 7.7.2021

Tax Attorney Returns to McCarter & English, Law360 Pulse, 5.13.2021

There May Be a Few Ways to Improve Tax Court Limited Appearances, Tax Notes, 2.3.2021

Initial Remote Tax Court Proceedings Have Had Few Hiccups, Tax Notes, 2.2.2021

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