

Tax

Our tax attorneys dedicate their practice to the complete array of ever-changing tax issues. Our attorneys have advanced legal and Certified Public Accountant (CPA) qualifications for advising individuals and businesses, and offering extensive tax planning and tax controversy services.

We have immediate access to subject matter legal professionals practicing in virtually any area of business law or litigation.

Areas of Practice

- Controversy and Collection
- Payment Arrangements
- Choice of Entity
- Corporate Reorganizations
- Exempt Organizations
- Aerospace Planning and Compliance
- State and Local Income and Sales/Use Tax
- Preparation of Income, Gift, Estate and Fiduciary Tax Returns
- Due Diligence Review for Mergers and Acquisitions
- Like-Kind Exchanges
- Tax Opinions
- Tax Allocation Agreements
- Ruling Requests

Our work includes planning tax strategies for businesses and individuals, transaction support, applying for rulings and determination letters, and representing clients in tax disputes with various government agencies. Our representation of business clients also includes providing advice during all phases of the business life-cycle. We represent tax-exempt organizations and foundations addressing issues of formation and operation. We also represent clients in disputes with various state and local revenue departments in cases involving income, franchise, property, sales/use taxes, and unclaimed property.

Experience

Counseled a University on Unrelated Business Taxable Income Considerations

PROFESSIONALS

Lee R. Augustine
Certified Public Accountant

Joe Demko
Partner

Lisa M. Kellermann
Paralegal

Mark G. Kmiecik
Partner

Alice A. Lin
Partner

Gregory J. Sell
Partner

Debra Theine
Paralegal

Peggy A. Thompson
Paralegal

Joseph E. Tierney IV
Partner

Tax

Acted as General Counsel for a Contract School for Seven Years

Counseled-Tax Sensitive Investors in Joint Ventures Unrelated Taxable Income Matters

Counseled a Nonprofit University on Donor Reporting Issues and Employment Reimbursement Tax Matters

Counseled a Luxury Goods and Services Conglomerate on Tax Issues in its Acquisition of a Whiskey Company

Represented a Bank Holding Company in a Merger Valued at Approximately \$473 Million

Counseled a Bank on Tax Issues During its Acquisition of Another Bank and its Subsidiary

Represented a NYSE-Listed Industrial REIT with Respect to Several Public Offerings Utilizing Diverse Structures

Served as Legal Counsel to a Health Care Real Estate Company in its Acquisition of Several Senior Living Properties

Represented One of the Largest Privately Owned Commercial Banks in the Milwaukee Region During an Acquisition

Provided Counsel to a Bank Holding Company and its Subsidiary in M&A, Subordinated Debt and Other Transactions

Successfully Represented a Bank Holding Company in Tax Matters During its Acquisition of Another Bank Holding Company

Served as Tax Advisor in a Banking Merger on the East Coast

Represented a \$9.5 Billion Dollar Financial Holding Company in its Acquisition of a Florida Based Investment Management Company

Served as Counsel to an HVAC Company Resolving its Employment Tax Liability

Serves as Counsel to an Amateur Sports Organization and its Establishment of a Scholarship Program

Serves as Counsel to an Individual in the Sale of his Biotech Company

Prosecuted Over \$5 Million Commercial Property Tax Refund Through the Missouri State Tax Commission

Firm News

Amundsen Davis Named in the 2024 Edition of Best Law Firms®
Firm News, November 2, 2023

Tax

91 Amundsen Davis Attorneys Recognized by Best Lawyers® in 2024 in America
Firm News, August 17, 2023

Attorney Alice Lin Joins Amundsen Davis's Chicago Office
Firm News, July 10, 2023

U.S. News & World Report – Best Lawyers® “Best Law Firms” 2023
Firm News, November 3, 2022

U.S. News & World Report – Best Lawyers® “Best Law Firms” 2022
November 4, 2021

34 Amundsen Davis Attorneys Recognized by *Best Lawyers in America*© 2022
August 19, 2021

U.S. News & World Report – Best Lawyers® “Best Law Firms” 2021
November 5, 2020

30 Amundsen Davis Attorneys Recognized in *Best Lawyers in America*© 2021
August 20, 2020

U.S. News & World Report – Best Lawyers® “Best Law Firms” 2020
November 1, 2019

19 Amundsen Davis Attorneys Named to *Best Lawyers in America*© 2020
August 15, 2019

U.S. News & World Report – Best Lawyers® “Best Law Firms” 2019
November 1, 2018

Amundsen Davis Ranks on Crain's Chicago Business' 2018 Largest Law Firms List
Crain's Chicago Business, October 25, 2018

15 Amundsen Davis Attorneys Included in Best Lawyers in America© 2019
August 15, 2018

U.S. News & World Report – Best Lawyers® “Best Law Firms” 2018
November 1, 2017

Amundsen Davis Ranks on Crain's Chicago Business' Largest Law Firms List
Crain's Chicago Business, September 15, 2017

12 Amundsen Davis Attorneys Included in Best Lawyers in America© 2018
August 15, 2017

U.S. News – Best Lawyers® “Best Law Firms” 2017
Firm News

Amundsen Davis Ranks on Crain's Chicago Business' Chicago Largest Law Firms
List
Firm News, *Crain's Chicago Business*, September 10, 2016

Seven Amundsen Davis Attorneys Included in Best Lawyers in America© 2017
August 15, 2016

U.S. News – Best Lawyers® “Best Law Firms” 2016

Alerts

IRS Provides Tax Inflation Adjustments for Tax Year 2022
Article, November 12, 2021

Inflation is Back, Should You Consider Consumer Price Index (CPI) Rent Increases
in Your Leases?
Article, September 30, 2021

How Might Joe Biden’s Tax Proposals Affect You?
Article, May 14, 2021

Section 1031 Tax Deferred Exchanges: Implications of the Biden Proposal
Article, April 29, 2021

Year-End Corporate Tax Considerations: The Essentials
Article, December 3, 2020

Individual Tax Planning Following the November 2020 Elections
Article, November 30, 2020

Family Business Succession Planning in the Era of Tax Uncertainty: Use Available
Tax Advantages or *Perhaps* Lose Them
Article, October 22, 2020

City of Milwaukee Property Tax Notice of Assessment Objection/Appeal
Deadline – May 18, 2020
Article, May 5, 2020

Missouri State Tax Relief – Filing Deadline Now July 15, 2020
Amundsen Davis Tax Alert, March 27, 2020

CARES Act: Historic Senate Legislation to Provide Individuals with Personal Tax
Rebates Among Other Tax Advantages (Updated March 27, 2020)
Article, March 26, 2020

Claiming Tax Credits For Paid Leave Under The Emergency Family And Medical
Leave Act And The Emergency Paid Sick Leave Act
Article, March 26, 2020

CARES Act: Robust Tax Benefits for Businesses
Article, March 26, 2020

Gift Tax Returns and COVID-19
Amundsen Davis Tax Alert, March 24, 2020

Tax

Legislative Tax Relief for Employers and Their Employees Affected by the Coronavirus Pandemic

Amundsen Davis Tax Alert, March 22, 2020

Tax Filing Update

Amundsen Davis Tax Alert, March 21, 2020

IRS Relief for Taxpayers Affected by the Coronavirus Pandemic

Amundsen Davis Tax Alert, March 19, 2020

Due Date for Payment of Certain Taxes Due April 15, 2020 Postponed to July 15, 2020 Pursuant to IRS Notice 2020-17

Article, March 18, 2020

Stage Is Set for Significant Retirement Bill to Pass by Year End (SECURE Act)

Article, December 18, 2019

Business Succession Opportunities after Tax Reform

Amundsen Davis Corporate Alert, March 2, 2018

New Partnership Audit Rules for 2018

Article, November 6, 2017

IRS Announces 2018 Estate and Gift Tax Limits

Article, November 6, 2017

Tax Reform Update

Article, November 3, 2017

Modern Commercial Financing: Your Guide to Regulation A+

Article, September 25, 2017

Tax Reform In the Making: A Comparison of the Potential Revisions

Article, March 2, 2017

Events

Managing New Legal Mandates for Multi-State Employers

Event, Amundsen Davis, Webcast, June 11, 2024

Your Employee Asked to Work Remotely Indefinitely (or Short Term): Important Legal Considerations Before You Say Yes

Event, Amundsen Davis, Webcast, June 23, 2021

Tax Changes on the Horizon with the Biden Administration

Event, Amundsen Davis, Webcast, April 14, 2021

It's Time To Thrive – Getting Your Business Back On Track in 2020

Speaking Engagement, BizTimes Media's Family & Closely Held Business Summit 2020, Webcast, July 22, 2020

Tax

Paycheck Protection Program: Factors for Considering a Loan
Event, Webcast, April 2, 2020

Doing Business with CANNABIS
Rockwell Beer Co.; St. Louis, MO, June 26, 2019

Gifting Techniques Using Trusts and The Use of Family Limited Partnerships/LLCs
in Estate Planning
Speaking Engagement, Radisson Milwaukee West Hotel; Milwaukee, WI, February
28, 2019

Reconciling State and Federal Audits After New IRS Partnership Audit
Regulations: Tax Reporting Challenges
Speaking Engagement, Strafford; Webcast, November 13, 2018

New Partnership Representative Final Regulations Under Section 6223
Centralized Audit Regime
Speaking Engagement, Strafford; Webcast, October 25, 2018

Estate Planning and New IRS Centralized Partnership Audit Rules: Impact on
Trusts Holding Partnership Interest
Event, Stafford; Webcast, May 30, 2018

Step-by-Step Estate Planning II
Event, State Bar of Wisconsin Seminar Series; Milwaukee, WI, February 23, 2018

What Does Tax Reform Mean for You and Your Business?
Event, Northern Trust Economic Trends 2018; Milwaukee, WI, January 19, 2018

Gifting Techniques Using Trusts and The Use of Family Limited Partnerships/LLCs
in Estate Planning
Speaking Engagement, State Bar Center; Madison, WI, February 23, 2017

Fundamentals of Buying and Operating Business Aircraft
Amundsen Davis, Seminar, Chicago, IL, September 20, 2016

2016 Tax Changes Update
Webinar, Illinois Chamber of Commerce, March 1, 2016

Blog Posts

REGISTER NOW – Managing New Legal Mandates for Multi-State Employers –
Webcast on June 11
Labor & Employment Law Update, May 21, 2024

What the Show *Succession* Teaches Us About Planning for a Family Business
Corporate News: A Legal Update, September 7, 2023

IRS Issues Final Section 162(m) Regulations on Companies' Ability to Deduct Executive Pay

Labor & Employment Law Update, March 2, 2021

IRS Issues Limited Guidance on Payroll Tax Deferral Option

Labor & Employment Law Update, August 31, 2020

New Guidance: A Reminder the Cadillac Tax is Still Looming

Labor & Employment Law Update, August 31, 2015

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