

Stuart A. Simon

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Of Counsel

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Areas of Practice & Industry Specialties

Tax, Benefits and Estate Planning; Litigation; Trust and Estate Litigation; Family Office & Wealth Management; Apparel & Consumer Products; Hospitality, Food and Beverage Industry Law; Agribusiness; Equine Law

A certified tax specialist, Stuart Simon's transactional tax expertise is key to the firm's transactional tax credit practice which services lenders, community development entities, major national corporations, midsize companies, and wealthy individuals. In addition, Mr. Simon provides assistance to the Litigation Practice Group in its tax controversies practice and probate practice, and has represented taxpayers before the Internal Revenue Service, Franchise Tax Board, and the State Board of Equalization. He is also a certified specialist in Estate Planning, Trust and Probate Law and has extensive experience handling tax, business, and personal planning matters. He has assisted in the formation of charitable organizations and their qualification for tax-exempt status, both for publicly supported and private foundations, and the ongoing operations as tax-exempt organizations. Mr. Simon has also represented tax-exempt organizations before the Internal Revenue Service.

Mr. Simon was an executive committee member of the State Bar of California (Taxation Section), serving as Treasurer and Vice-Chair. He is past Chair of the Annual Income Tax Seminar at Whittier Law School and is an adjunct professor at Golden Gate University's Los Angeles campus, where he teaches income tax and estate planning.

Mr. Simon has been selected by *Super Lawyer Magazine* as one of Southern California's Super Lawyers in 2007, and 2010 to 2021.

Publications

- Beware of Proposition 19 Property Tax Increases—Planning Opportunities Still Exist for a Brief Window, *Buchalter Client Alert*, November 17, 2020
- Buchalter Client Alert COVID-19: Opportunities in an Economy Shattered by Covid-19, *Buchalter Client Alert*, April 23, 2020
- Buchalter Client Alert COVID-19: Estate Planning, *Buchalter Client Alert*, April 20, 2020
- Tax Credits to Offset Congress' Newly-Mandated Paid Leave, *Buchalter Client Alert*, March 20, 2020
- Tip Pooling Tax Implications—What Employers Need to Know, *Buchalter Nemer Hospitality, Food and Beverage Industry Newsletter*, November 9, 2015

Presentations

- Speaker, "Tax Lessons from Tax Returns," State Bar Annual Meeting of the California Tax Bar, November 9, 2013

Education

Mr. Simon earned his J.D. at Loyola Law School and his LL.M. in Taxation at New York University School of Law. He is also a Certified Public Accountant in California and admitted to practice before all the state courts in California, the U.S. Tax Court, the U.S. Court of Federal Claims, and the four U.S. District Courts in California.

Bar Admissions

- California
- U.S. Tax Court

Court Admissions

- U.S. Court of Federal Claims
- U.S. District Court for the Central District of California
- U.S. District Court for the Eastern District of California
- U.S. District Court for the Northern District of California
- U.S. District Court for the Southern District of California