

**Stuart A. Simon**

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Stuart Simon is Of Counsel in the Firm's Los Angeles office and a member of the Tax, Corporate and Real Estate Practice Groups. A certified tax specialist, Mr. 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 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 on-going operations as tax-exempt organizations. Mr. Simon has also represented tax-exempt organization before the Internal Revenue Service.

**Recent Publications**

- Co-Author, "Pay or Play? What Employers Need to Know About the Affordable Care Act," *Buchalter Nemer Client Alert*, June 2013
- "Is Your Financial Institution Ready for the New 'FIRM'?", *Buchalter Nemer Client Alert*, October 2011; *Daily Journal*, December 21, 2011

Mr. Simon is an executive committee member of both the State Bar of California (Taxation Section) and the American Association of Attorneys-Certified Public Accountants. He is Chair of the Annual Income Tax Seminar at Whittier Law School and an adjunct professor at Golden Gate University's Los Angeles campus, where he teaches income tax and estate planning.

Mr. Simon has been selected as one of Southern California's *Super Lawyers* seven times from 2007-2015.

Mr. Simon earned his J.D. at Loyola University of Los Angeles School of Law 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, and the U.S. Court of Federal Claims.

**Areas of Practice**

Tax & Estate Planning  
Estate Planning and Wealth Transfer  
Litigation  
Hospitality, Food & Beverage

**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