

Calfee's tax attorneys provide comprehensive tax law representation and planning for a diverse client base that includes publicly held companies, privately held businesses, not-for-profit corporations, trusts, partnerships, associations, and individuals. Our tax attorneys are involved in all aspects of the firm's transactional practice and can draw upon their experience in General Corporate law, Mergers and Acquisitions, Estate Planning and other related areas to provide creative but practical tax planning for our clients.

Calfee's tax attorneys are service oriented. Our approach is to devise efficient methods to plan successful transactions. We believe our role is not simply providing tax advice when asked, but offering solutions that avoid problems. Our goal is to identify our clients' tax issues and to resolve those issues effectively with responses that take into account all relevant business, personal, and family considerations.

Representative Experience

Tax Disputes and Litigation

- > Representation of clients before the U.S. Tax Court, the IRS, the Ohio BTA and the Ohio Supreme Court
- > Sales and use tax audit representation
- > Structuring of litigation settlements

Real Estate Transactions

- > Drafting partnership agreements and LLC operating agreements
- > Like-kind exchanges

Tax-Exempt Organizations

- > Organizing tax-exempt entities
- > Providing assistance in obtaining tax-exempt status
- > Maintaining and monitoring tax-exempt status with analysis of issues such as UBIT and self-dealing

Corporate Tax Planning

- > Choice of entity
- > Taxable and tax-free transactions
- > Corporate spin-offs
- > Bankruptcy reorganizations
- > Corporate structuring and restructuring
- > Private letter ruling requests
- > Succession planning (Family LPs and LLCs)

State and Local Tax Planning

- > Identifying government tax incentive programs
- > Sales and use tax planning

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Employment Benefits and Compensation

- > Executive compensation strategies
- > Drafting of stock option plans, restricted stock plans and phantom stock plans
- > Split-dollar insurance planning
- > Employee v. independent contractor analysis