MusickPeeler



Tax & Employee Benefits

Musick Peeler's Tax & Employee Benefits Group covers general taxation, exempt organizations, the Employee Retirement Income Security Act (ERISA), and tax controversies involving these practices.

Related Professionals

Richard A. Galofaro
Practice Group Leader

E. Garrett Barlow

David G. Mann

Gary L. Wollberg

David C. Wright

Related Practice Groups

Labor & Employment

Taxation

The firm's general taxation practice advises individuals and entities about United States, California, and local tax consequences of various transactions including the formation, reorganization and disposition of businesses, sales or exchanges of assets, and issuance of debt and equity securities. The practice also encompasses representation of resident and nonresident individuals involved with publicly and privately held multinational corporations that are engaged in business and investment activities both inside and outside the United States.

Exempt Organizations

Musick Peeler's exempt organization practice includes representation of clients such as hospitals, universities, museums, private and public foundations, trade associations and other entities which are generally exempt from Federal and State taxation. The firm's attorneys advise clients regarding the formation of such entities, maintenance of tax-exempt status, obtaining IRS determination letters, taxation of unrelated business taxable income, fundraising and compliance requirements under federal, state, and local rules and regulations.

ERISA

The firm's ERISA practice provides retirement and benefit planning, and deferred compensation arrangements for highly compensated individuals, as well as advice regarding the implementation and admission of employee pension and welfare benefit plans for various businesses, education and health care institutions, and municipalities. The firm also advises both closely-held and publicly-traded corporations in all areas pertaining to the establishment, implementation, and operation of employee stock ownership plans (ESOPs) in connection with both leveraged and non-leveraged transactions. In addition ERISA attorneys work with the firm's Labor & Employment Group on pension and welfare planning matters, and the resolution of employment related disputes linked to such matters.

Tax Controversies

Every category involves tax controversies. Attorneys in each discipline represent clients in various phases of interaction with government authorities, including property tax appeals, sales and business license tax matters, private letter ruling requests, and IRS examinations and assessment procedures. Musick Peeler's attorneys have appeared before the United States Tax Court and other federal courts, including the United States Supreme Court.

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