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Joshua P. Katz

HFM Partner Joshua Katz is a tax law attorney licensed in California and with the U.S. Tax Court.

Mr. Katz practice focuses on effectively and efficiently handling tax controversy matters, which include audits, appeals, tax liens, levies, installment agreements and offers in compromise. He also assists clients with corporate and LLC issues, from formation to dissolution.

Mr. Katz represents both corporate and individual tax clients before the Internal Revenue Service, the California Franchise Tax Board, the California Department of Tax and Fee Administration, and other state taxing authorities on every type of tax issue, including income, sales, payroll, property and excise taxes.

Notable results include:

- Convincing the FTB to fully concede more than $1 million in proposed income taxes stemming from a residency audit.
- Obtaining a favorable settlement with the IRS involving alleged retirement account prohibited transactions, preventing termination of taxpayers' retirement accounts as well as the imposition of over $3 million in taxes and penalties.
- Defending entrepreneurs from an FTB claim for over $2 million in proposed taxes based on multi-state tax law, resulting in nothing owed to the State.
- Navigating taxpayers with undisclosed foreign assets and accounts through the Offshore Voluntary Disclosure

PRACTICE AREAS

- Tax Law
- Corporate & Securities Law

EDUCATION

- LL.M., Taxation, University of San Diego (2011)
- J.D., Tax Concentration, University of California Hastings College of Law (2008)
- B.A., Plan II Honors Program, University of Texas at Austin (2002)

ADMITTED TO PRACTICE

- California
- U.S. Tax Court

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Program ("OVDP"), Streamlined Filing Compliance Procedures, and other avenues for getting into compliance.

- Successfully defending employers from employee-classification audits.
- Obtaining innocent spouse and equitable relief for several taxpayers who had outstanding tax debts resulting from the misdeeds of their spouses.

Mr. Katz was selected to the 2021, 2022, 2023, and 2024 Best Lawyers in America© "Ones to Watch" list, recognizing lawyers who have been in private practice between five and ten years. This award highlights the most promising younger lawyers in the country.

Prior to joining HFM, Mr. Katz practiced civil and criminal law in the San Francisco Bay area. He interned for the San Francisco District Attorney Pre-trial Division and the San Diego County District Attorney Economic Crimes Division and Lifer Hearing Unit. In 2018 and 2019, he was selected as a Super Lawyers Rising Star.

Speaking Engagement

- **AB5, Prop 22, and Workers Classification**, *California Society of Enrolled Agents, Palomar Chapter,* November 18, 2020 (presented with Kyle Nageotte)

AWARDS & HONORS

- Recognized by Best Lawyers in America© "Ones to Watch" (2021-2024)
- Super Lawyers® "Rising Star" (2018-2019)

AFFILIATIONS

- State Bar of California, Taxation Section
- San Diego County Bar Association, Taxation Section