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Areas of Focus

Practice

State and Local Tax

David is the Co-Chair of Stevens & Lee's State and Local Tax Group. He focuses on representing clients in complex state tax controversies during audits, before administrative boards and in courts across the country. David also provides sophisticated multistate tax advice to his clients regarding their business operations, assists with navigating the state tax implications of corporate mergers and acquisitions and consults with clients and their lobbyists on pending state tax legislation and regulations.

With nearly 30 years of experience in state tax, David brings to his clients an extensive knowledge of state tax law, strong relationships with state revenue departments, a track record of successfully litigating state tax cases and a deep understanding of procedural and strategic aspects of handling complex state tax audits and appeals. David has extensive experience in all areas of state taxation including state corporate income, sales and use, personal income, utility, insurance company and realty transfer taxes. He also advises clients on tax incentives, unclaimed property and unemployment compensation issues. David has handled audits, administrative appeals and litigation across the country and in states including New Jersey, New York, Pennsylvania, Massachusetts, Connecticut, Maryland, Delaware, New Hampshire and Rhode Island.

David is a frequent national speaker on multistate tax topics for many organizations, including the Council on State Taxation, the New York University Institute on State and Local Taxation, the Institute of Professionals in Taxation, the Tax Executives Institute, the Practising Law Institute, the Georgetown Advanced State and Local Tax Institute, the Wall Street Tax Association – State and

Local Tax Committee, the Pennsylvania Bar Institute, the New Jersey State Bar Association, the New Jersey Society of Certified Public Accountants and the New York State Society of Certified Public Accountants.

David is a member of the American Bar Association's State and Local Tax Committee, a member of the advisory board for the New York University Institute on State and Local Taxation, a founding committee member for the Institute for Professionals in Taxation's Income Tax Schools and has served as a member of New Jersey's Corporation Business Tax Study Committee. He also is a member of the New Jersey Chamber of Commerce's and New Jersey Business and Industry Association's Joint State Tax Committee and frequently contributes to those organization's legislative and regulatory efforts.

Additionally, David has published state tax articles in *State Tax Notes*, the American Bar Association's *The State and Local Tax Lawyer* and Commerce Clearing House's *State Tax Review* and he is frequently contacted by news organizations to comment on emerging state tax issues.

Affiliations

- American Bar Association
 - State and Local Tax Executive Committee
 - Taxation Law Section
- New York University Institute on State and Local Taxation Advisory Board
- Institute of Professionals in Taxation
 - Income Tax Schools Committee Member
- New Jersey Chamber of Commerce and New Jersey Business and Industry Association
 - Joint State Tax Committee Member
- New Jersey Corporation Business Tax Study Commission (2002-2004)

Recognition

- David has been named to the Best Lawyers in America (2024 edition) in the area of Tax Law

Education

- Wake Forest University School of Law, J.D.
- University of Richmond, *cum laude*, B.A.

Bar Admissions

- New Jersey
- New York
- Pennsylvania

Court Admissions

- U.S. District Court for the Middle District of Pennsylvania