

Steven L. Jager, C.P.A.

An Accountancy Corporation • Admitted to Practice in the United States Tax Court

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C U R R I C U L U M V I T A E

SERVICES:

Accountancy services directed principally to closely held businesses, physicians, lawyers, professionals and other executives covering substantially all areas of finance, taxation and accounting:

- Analysis and Planning:
 - Business plans and strategic planning of transactions;
 - Negotiation of loans, lines of credit and leases;
 - Federal and state income taxation including representation before taxing authorities (Audit, Appeals and Collections)
 - Tax litigation in the United States Tax Court
- Control and Reporting:
 - Management information systems;
 - Federal and state income tax return preparation;
 - Recordkeeping and bookkeeping

EXPERIENCE:

Entered full-time public practice in December, 1980. Former employers include prestigious local firms and a national firm. Established own practice in July, 1988.

EDUCATION:

University of California, Los Angeles. B.A., June, 1979.

California State University, Los Angeles. Post-graduate coursework in accounting, finance & marketing - 1979 through 1981.

California State University, Northridge. M.S., Taxation, May 2013

LICENSURE:

State of California Certified Public Accountant, 1986.

BAR ADMISSION:

United States Tax Court

SOCIETIES:

- Member, American Institute of Certified Public Accountants;
- Member, California Society of Certified Public Accountants;
- Member, National Society of Public Accountants;
- Associate Member, California Society of Enrolled Agents
- Associate Member, California State Bar, Taxation Section & Member, Committee on Tax Procedure and Litigation.
- Associate Member, American Bar Association, Taxation Section

PROFESSIONAL ACTIVITIES:

Panelist, 2017 California Society of Enrolled Agents Practitioner Forum on both IRS Examinations and Collections.

Lecturer, "Timely Ethics Case Studies," presented to the San Fernando Valley chapter of the California Society of Enrolled Agents, July 2016.

Panelist, 2015 UCLA Extension Tax Controversy Institute, "Dialing for Dollars: The IRS Collection Process"

Author, "Preserving the Administrative Record of the CDP Hearing," published by Journal of Tax Practice and Procedure, Commerce Clearing House, January 2016.

Panelist, 2014 USC Gould School of Law Tax Institute, "IRS Collection Procedures and Practitioner Tools: Negotiating Offers in Compromise and Installment agreements in a Recessionary Economy."

Author, “Klatsch’ Advice for CPAs and EAs in a Recessionary Economy,” published by Journal of Tax Practice and Procedure, Commerce Clearing House, January 2011.

Panelist, 2010 UCLA Extension Tax Controversy Institute, “Administrative Techniques in a Recessionary Economy: CDP, IA, OIC, Innocent Spouse and FOIA Requests”

Author and Lecturer, “It’s Not Your Daddy’s IRS Anymore!”, presented throughout 2005 and 2006 to California State University, Los Angeles, Department of Continuing Education, and to the Society of California Accountants.

Instructor, University of California, Los Angeles Extension Program, Department of Business and Management.

Instructor, Finance & Accounting, Institute of Applied Management & Law, Newport Beach, CA, Certificate in Business Management Seminar.

Sponsor and Member, Advisory Board of the UCLA Extension Tax Controversy Institute

REFERENCES:

Available on request.