

## Attorney General, IRS, Franchise Tax Board, and Property Tax Proceedings


The Internal Revenue Service, the California Franchise Tax Board, and state Attorneys General retain the right to audit a charitable organization's activities to ensure compliance with federal and state tax-exemption requirements and state charitable trust laws. In many cases when such an audit arises, it is critical for the entity to obtain legal counsel to increase the likelihood of a positive outcome. Adler & Colvin attorneys offer an array of services to help clients through audits, including helping clients come into compliance with the applicable laws before an audit.


### AREAS OF FOCUS

- › Attorney General audits.
- › Application of the charitable trust doctrine and cy pres proceedings.
- › IRS audits and proposed revocations or adjustments of exempt status.
- › Franchise Tax Board proceedings.
- › California property tax disputes.
- › Legal advice on federal and state tax-exemption status, unrelated business income tax, and excise tax rules, both in anticipation of and during audits.
- › Review of exempt organization informational and tax returns.
- › Preemptive “legal audits” of nonprofits to identify issues before a regulatory audit occurs.

### CONTACT INFORMATION

 [contact@adlercolvin.com](mailto:contact@adlercolvin.com)

 (415) 421-7555

 (415) 421-0712

### PRACTICING ATTORNEYS

- › Robert A. Wexler
- › David A. Levitt
- › Stephanie L. Petit
- › Matt Clausen
- › Jorge Lopez