

## LISA M. BLUM

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### Education and Professional Credentials

- LL.M. - Taxation, New York University – School of Law, 2003
- J.D. State University of New York at Buffalo – School of Law, 1992, *Magna cum laude*
- B.S. State University of New York at Buffalo, 1988, *Summa cum laude, High Distinction*
- B.A. State University of New York at Buffalo, 1988, *Summa cum laude*
- Member of the New York State Bar – Admitted 1993
- Certified Public Accountant

### Employment

- 1995 to Present: Instructor of Commercial Law and Accountancy, University of Louisville, College of Business and Public Administration
- 1993 to 1994: Adjunct Instructor, State University of New York at Buffalo, School of Management
- 1992 to 1995: Senior Tax Specialist, KPMG Peat Marwick, Buffalo, New York
- 1990 to 1992: Kane & Sabo, CPA's, Staff Accountant

### Publications - Refereed Journals

- Coppage, Richard E.; Baxendale, Sidney J.; and Blum, Lisa M., "The Reduced Benefit of Contributing Intangibles After the 2003 Tax Act", 103 *Tax Notes* 347 (April 2004).
  - Ivancic, Lisa M., and Coppage, Richard E., "Burden of Proof, Taxpayers Remained Burdened Despite Shifted Burden of Proof", 62 *Practical Tax Strategies* 284 (May 1999).
  - Baxendale, Sidney J., Coppage, Richard E., and Ivancic, Lisa M., "Annual Gift Exclusion: Give Appreciated Property or Sell Appreciated Property and Give Cash?"; 11 *Personal Financial Planning* 19 (July 1999).
  - Ivancic, Lisa M.; Coppage, Richard E.; and Baxendale, Sidney J.; "Estate Planning Strategies, Estate Planning Remains Critical Despite Law Changes"; 62 *Practical Tax Strategies* 98 (February 1999).
  - Coppage, Richard E.; Baxendale, Sidney J.; and Ivancic, Lisa M.; "The Increased Cost of Donating Appreciated Property After the Taxpayer Relief Act of 1997"; 82 *Tax Notes* 676 (February 1999).
  - Ivancic, Lisa M. and Coppage, Richard E.; "Bankruptcy and Taxes, Tax Planning Should Accompany Bankruptcy Filings"; 61 *Taxation for Accountants* 22 (July 1998).
- Reprinted in 27 *Taxation for Lawyers* 103 (September 1998).
- Baxendale, Sidney J.; Coppage, Richard E.; and Ivancic, Lisa M.; "Estate and Gift Planning After TRA '97"; 80 *Tax Notes* 943 (August 1998).
  - Coppage, Richard E.; Baxendale, Sidney J.; and Ivancic, Lisa M.; "Capital Gain Tax Cut Has Charitable Donation Cost"; 60 *Taxation for Accountants* 314 (May 1998).
  - Coppage, Richard E.; Baxendale, Sidney J.; and Ivancic Lisa M.; "Minimize AGI Once to Maximize Roth IRA Break"; 60 *Taxation for Accountants* 132 (March 1998).

Reprinted in 26 *Taxation for Lawyers* 354 (May 1998).

### Professional Presentations

#### 2000 Annual Louis A. Grief Tax Institute

- Estate and Gift Taxation: Wills, Probate, and Intestacy

#### 1998 Annual Louis A. Grief Tax Institute

- Highlights of the Internal Revenue Service Restructuring and Reform Act of 1998
- Burden of Proof Rules: An Analysis
- The New Accountant-Client Privilege

#### 1997 Annual Louis A. Grief Tax Institute

- Highlights of the Taxpayer Relief Act of 1997
- Federal Income Tax and Bankruptcy
- Estate Planning Update: An Analysis of the New Family-Owned Business Estate Tax Exclusion

#### 1996 Annual Louis A. Grief Tax Institute

- Postmortem Tax Planning and Practice
- Divorce and Remarriage: Tax Consequences
- Money Structuring and Civil Forfeiture

#### 1995 Annual Louis A. Grief Tax Institute

- What are the Implications of a Flat Tax? An Analysis of Different Plans
- Federal Estate and Gift Taxation: Estate Freeze Techniques
- Limited Liability Companies: Attributes, Advantages, and Uncertainties
- Tax Credits: 1995 Update

#### **Courses Taught**

- Advanced Taxation - Federal taxation of business entities (C Corporations, S Corporations, and Partnerships)
- Introduction to Taxation - Federal taxation of individuals
- Federal Taxation – Masters of Accountancy Program
- Commercial Law for Professional Accountants - Masters of Accountancy Program
- Legal Environment of Business
- Introduction to Financial Accounting
- Introduction to Managerial Accounting

#### **Honors and Awards**

- 2001 Service Award, College of Business and Public Administration
- 1999 Faculty Excellence Award, College of Business and Public Administration
- 1998 Undergraduate Teaching Award, College of Business and Public Administration
- 1997 Undergraduate Teaching Award, College of Business and Public Administration

#### **Current Committee Activities**

- *Chair:* Scholarship, Awards, and Honors Committee: This committee is responsible for awarding scholarships to undergraduate and graduate students
- *Faculty Advisor/Coordinator:* Joint MBA/JD Degree Program
- *Faculty Advisor:* Alpha Kappa Psi - Student Co-ed Business Fraternity

#### **Memberships**

- American Institute of Certified Public Accountants
- American Bar Association
- New York State Bar Association