

Jamey G. Rappis, J.D.**CliftonLarsonAllen LLP**Tax Principal
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***Profile***

Jamey Rappis, is one of the firm's leaders of CliftonLarsonAllen's Private Client Services consulting practice. He has extensive experience in the areas of estate and gift tax, estate and business succession planning, individual taxation, flow-through entities and retirement planning. Jamey leads the Private Tax consulting practice leveraging his tax and estate planning expertise across the firm to high net worth families and individuals. He is CliftonLarsonAllen's lead in reviewing and monitoring legislative, regulatory, and case law activity and is responsible for providing a national tax presence on high level tax consulting with new prospects and current clients in the areas of estate planning and business succession planning. With more than 20 years of experience, Jamey is a licensed attorney and has an extensive and diverse background with a specific emphasis on IRS controversies, including field, appellate, and tax court audit levels. Jamey has been involved in hundreds of IRS controversies, on both the side of the taxpayer and the government. Jamey is admitted to practice in the State of Wisconsin, the Eastern District Court of Wisconsin and the United States Tax Court.

Technical expertise

- Private tax, individual tax, flow-through entities
- Estate & Gift tax planning
- Business Succession
- Wealth Advisory
- IRS controversies, including field, appellate and tax court audit levels
- IRS audits and tier 1 tax issues, including research and development credit audits, NOL carrybacks, and shareholder basis issues
- Firm wide lead in reviewing and monitoring legislative, regulatory, and case law activity
- High level tax consulting in the areas of estate planning, business succession planning and complex individual taxation issues

Education/professional involvement

- Bachelor of Arts, History, Notre Dame
- Juris Doctor, Law, Marquette University