

## RESUME

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### ADMISSIONS

- Supreme Court of Texas
- Supreme Court of the State of New York, Appellate Division, Third Judicial Department.
- United States Tax Court
- United States Patent and Trademark Office
- United States District Court, Southern District of Texas
- Varying other state and local admissions (may be available upon request)

### EDUCATION & CERTIFICATES

- *Master of Laws (LL.M.) in Taxation* from the University of Houston Law Center
- *Doctorate (J.D.) in Jurisprudence* from South Texas College of Law Houston
- *Bachelor of Arts (B.A.) in Liberal Studies* from the University of Houston Main Campus
- *Certified Mediator* from the Austin Dispute Resolution Center
- *Notary Public*

### EXPERIENCE

SWAN LEGAL, P.L.L.C.

May 2024 to *Present*—Houston, Texas. *Founder, Sole Owner-Member & Managing Attorney* legal professional responsibilities included:

#### Legal Matters

- Litigated and conducted discovery in complex commercial and partnership disputes;
- Provided outside general legal counselling to individuals, families, and businesses;
- Drafted basic estate planning documents including ancillary documents;
- Advised on risk management, intellectual property protection, and legal compliance;
- Advised on entity selection, corporate governance, and legal compliance;
- Advised businesses on legal structuring such as during changes in owners, mergers and acquisitions, asset purchases, and transactional structuring;
- Drafted operating agreements, organizational minutes, stakeholder agreements, purchase & sale agreements, and various other commercial contracts;
- Researched, developed, and drafted business plans or other commercial instruments;
- Represented taxpayers before state and local courts and agencies; and
- Represented owners in federal and state trademark and copyright matters.

#### Tax Matters

- Represent taxpayers in tax controversy matters before the United States Tax Court;
- Represent taxpayers in matters relating to federal tax collections & appeals;
- Represent taxpayers in tax controversy matters before respective state and local agencies;
- Advise businesses on tax implications of mergers and acquisitions, asset purchases, and transactional structuring;



- Prepare tax workpapers, schedules, individual and business tax returns;
- Model tax scenarios to track and anticipate tax basis and potential tax exposures;
- Present strategic tax compliance protocols for complex tax structuring; and,
- Represent taxpayers in response to tax assessments or adverse collections actions, including requests for a collections due process hearing, innocent spouse relief, installment agreements, or an offer in compromise;

### **Mediation Matters**

- Mediated as an alternative dispute resolution method certified neutral-third party in matters including personal injury, civil litigation, as part of required mediation;
- Hosted partial, half, or full-day mediation conferences both virtually and in person; and
- Prepared and delivered mediated settlement agreements.

SWAN TAX, L.L.C.

May 2024 to *Present*—Houston, Texas. *Founder, Sole Owner-Member & Managing Tax Professional* tax professional responsibilities included:

### **Tax Compliance**

- Prepare tax returns, workpapers, schedules, and individual and business tax returns.

WEAVER AND TIDWELL, L.L.P. (“WEAVER”)

April 2023 to August 2024—Houston, Texas. *Transactions Tax, Senior Associate*

PRICEWATERHOUSECOOPERS, L.L.P. (“PWC”)

August 2022 to March 2023—Houston, Texas. *Mergers & Acquisitions (“M&A”) Tax Experienced Associate*

### **COMMUNITY IMPACT**

- April 2022 to Present—American Bar Association, Section of Taxation, *Member*;
- Spring 2026 to Present—American Bar Association, Section of Taxation, *Volunteer Credentialed Tax Professional for Virtual Settlement Week*;
- March 2018 to Present—Volunteer Income Tax Assistance Program, *Volunteer Tax Preparer*; and,
- April 2022 to Present—State Bar of Texas, Tax Section, *Member*;
- June 2022 to Present—New York State Bar Association, Section of Taxation, *Member*;
- March 2023 to Present—Houston Bar Association, Houston Volunteer Lawyers, *Volunteer Tax Attorney*;
- March 2017 to Present—Houston Bar Association, Eikenberg Fun Run, *Participant*;
- August 2018 to Present—Muslim Bar Association of Houston – *Board of Directors, Webmaster*; and,
- May 2018 to Present—Harris County, *Frequent Visitor*.

### **PUBLICATIONS**

- March 2026—Accessed via [www.trust-swan.com/blog/](http://www.trust-swan.com/blog/).

