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**PRIVATE & CONFIDENTIAL
COMMUNICATIONS**

NADINE ALKISWANY, J.D., LL.M.

CURRICULUM VITAE

EXECUTIVE SUMMARY

Ms. Nadine Alkiswany, J.D., LL.M., is an active and licensed attorney in multiple states, including Texas and New York. She is an active member in good standing of each respective state bar association and active within the Tax Section of the New York State Bar Association the State Bar Association of Texas.

Ms. Alkiswany is admitted to practice before the United States Patent and Trademark Office, the United States District Court for the Southern District of Texas, Houston Division, the Supreme Court of Texas, Supreme Court of the State of New York, Appellate Division, Third Judicial Department, and various other state and local courts.

Ms. Alkiswany an active and credentialed tax professional admitted to practice before the United States Tax Court, and the Internal Revenue Service, and is a paid tax preparer who may transmit returns electronically.

Ms. Alkiswany is a Public Notary and is certified as a Mediator for the State of Texas.

Ms. Alkiswany was admitted to the State Bar of Texas Pro Bono Bar College for her *pro bono* time and efforts, and is well known for her work in philanthropy and public service, including the honor in serving as a Director for the Board of the Muslim Bar Association of Houston and in serving as a long-standing Volunteer with Houston Volunteer Lawyers, the American Bar Association's Virtual Settlement Week, and with the I.R.S.'s Volunteer Income Tax Assistance Program.

Additionally, Ms. Alkiswany is a regular participant in the Houston Bar Association's Eikenberg 8k Law Week Fun Run benefiting the Pursuit Center, UTHealth's Houston Half Marathon benefiting community wellness and charitable outreach and is an accomplished marathon runner.

Ms. Alkiswany enjoys attending Houston Theater and Museum events or others that are for the benefit of the local community or various social causes, including constitutional rights, and women's, youth, and literacy programs.

To learn more, reach out to the contact information provided on this page.

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

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

Tax Matters

- i. Represent taxpayers in tax controversy matters before the United States Tax Court;
- ii. Represent taxpayers in matters relating to federal tax collections & appeals;
- iii. Represent taxpayers in tax controversy matters before respective state and local agencies;
- iv. Advise businesses on tax implications of mergers and acquisitions, asset purchases, and transactional structuring;
- v. Prepare tax workpapers, schedules, individual and business tax returns;
- vi. Model tax scenarios to track and anticipate tax basis and potential tax exposures;
- vii. Present strategic tax compliance protocols for complex tax structuring; and,
- viii. 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

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

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

WEAVER AND TIDWELL, L.L.P.

April 2023 to August 2024—Houston, Texas. *Transactions Tax, Senior Associate* tax advisory responsibilities included:

- i. Provided tax advisory services in connection with corporate mergers, acquisitions, and private equity transactions;
- ii. Conducted tax due diligence for target corporations, partnerships, and disregarded entities;
- iii. Drafted and delivered comprehensive tax due diligence reports evaluating federal tax exposures;
- iv. Analyzed tax attributes including basis adjustments, net operating losses, and ownership changes under Internal Revenue Code §382;
- v. Modelled tax consequences of transaction structures and asset step-ups; and,
- vi. Advised deal teams regarding tax risks associated with corporate acquisitions and restructurings.

PRICEWATERHOUSECOOPERS, L.L.P.

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

- i. Advised corporate clients and private equity investors on federal tax implications arising in corporate transactions;
- ii. Documented corporate minutes including bankruptcy plans, financial statements, IRS filings, confidential information memoranda, and formation documents;
- iii. Analyzed tax exposures related to target C corporations, S corporations, and multinational enterprises;
- iv. Drafted tax due diligence reports for mergers and acquisitions;
- v. Prepared audit support memoranda relating to worthless stock loss deductions; and
- vi. Drafted tax opinions addressing worthless stock loss deductions arising from stock sales within consolidated groups under Treasury Regulation §1.1502-36.

EEPB INNOVATAX, L.L.C.

April 2022 to July 2022—Houston, Texas. *Research & Development Tax Associate* tax representative responsibilities included:

- i. Provided federal tax consulting services related to innovation-based tax incentives;
- ii. Prepared research and development tax credit studies;
- iii. Responded to IRS Information Document Requests; and
- iv. Modeled eligibility and calculation of Employee Retention Credits and Research and Development tax credits.

STROHMEYER LAW, P.L.L.C.

March 2018 to December 2021—Houston, Texas. *Legal Assistant / Law Clerk* responsibilities included:

- i. Attendance and observer to contested and uncontested probate litigation;
- ii. Clerical assistant on matters relating to client intake, estate plan document drafting, tax and entity structuring, and tax modeling; and

- iii. Research and drafting for clients matters relating to issues relating to high-net worth or estate, gift, or international tax compliance.

HARRIS COUNTY DISTRICT CLERK’S OFFICE

May 2018 to August 2018—Houston, Texas. *Judicial Administration Intern* legal professional responsibilities included:

- i. Procedurally trained in administration of court records and county technology;
- ii. Observed court proceedings including civil jury pool, procedural hearings, civil trials, and historical records access and archival locations; and
- iii. Supported document review and case management activities within the Harris County District Court system.

SOLE PROPRIETOR

March 2017 to August 2022—Houston, Texas. *Independent Contractor* business professional responsibilities included providing and coordinating access to or performing professional support services for small and independent business owners, such as:

Business Matters

- i. Coordinated operational systems using technology, including custom intranet, data protection protocols, and systems maintenance procedures;
- ii. Complex website and brand content creation with operational considerations including e-commerce stores, real estate listings, digital products, and global out-sourcing;
- iii. Case study development as to advertising techniques and strategic marketing;
- iv. Conducted market research and risk-benefit business memorandums;
- v. Drafted and published technical, branded, and tailored business writing materials;
- vi. Provided customers and subscribers access to my vetted network of sub-contractors, and,
- vii. Prepared and supported preparation of income tax returns for U.S. and global taxpayers.

EDUCATION

UNIVERSITY OF HOUSTON LAW CENTER

May 2021—Houston, Texas. *Master of Laws (LL.M.) in Taxation*

- i. Honors, Certificates, & Awards: Dean’s Merit Scholarship;
- ii. Memberships: Graduate Research Assistant, *International Tax*;
- iii. Relevant Coursework: Estate and Gift Tax, Partnership Tax, Corporate Tax, International Tax, Employee Benefits Tax, Real Estate Tax, Tax Policy & Ethics, Tax Procedure, and Financial Instruments.

SOUTH TEXAS COLLEGE OF LAW HOUSTON

May 2019—Houston, Texas. *Doctorate (J.D.) in Jurisprudence*

- i. Honors, Certificates, & Awards: Dean’s Merit Scholarship, Susan B Scoble Scholarship, and Pro Bono Honors Certificate;
- ii. Memberships: Muslim Legal Society, *President*; Phi Alpha Delta, International Law Organization, *Vice Justice*; Israel Law and Policy Tour, *International Delegate*; and



- iii. Relevant Coursework: Constitutional Law, Civil Procedure, Corporate Law, Partnership Law, Federal Income Tax, Advanced Tax Research, International Tax, Clinical Tax, Collaborative Law, Corporate Law, Islamic Law, Military Law, Law and Politics Policy Seminar Writing.

UNIVERSITY OF HOUSTON, MAIN CAMPUS

May 2014—Houston, Texas. *Bachelor of Arts in Liberal Studies*

- i. Honors, Certificates, & Awards: C.L.A.S.S., Honors College, *Collegiate Honors Award*;
- ii. Memberships: Phi Alpha Delta, *Pre-Law Mock-Trial Member*; and Spanish-language immersion program for heritage speakers in Mexico; and,
- iii. Relevant Coursework: English Capstone Course: The Pursuit of Happiness; Honors Capstone Course: Political Theory; and Advertising Capstone Course: Selling

WHARTON COUNTY JUNIOR COLLEGE

December 2011—Houston, Texas. *Associate of Arts in Business Administration*

- i. Relevant Coursework: Physiology & Anatomy; Business Statistics; Principles of Accounting & Managerial Accounting; and Public Speaking.

NEEDVILLE INDEPENDENT SCHOOL DISTRICT, NEEDVILLE HIGH SCHOOL

May 2009—Needville, Texas. *High School Diploma*

- i. Honors & Awards: Distinguished Honors Graduate;
- ii. Memberships: Yearbook, *President of People Section*; Tennis, *Junior Varsity*; U.S. Presidential Inauguration, *Delegate & Attendee*; and;
- iii. Relevant Coursework: Spanish I & II, Pre-Calculus, Algebra I & II, Yearbook I & II, Woodworking I & II, Agriculture I, Peer Assisted Leadership Students (P.A.L.S.)—Mentor I, Sewing & Interior Design, Economics, and Student Council.

BAR ADMISSIONS

April 2022—State Bar of Texas.

June 2022—New York State Bar.

COURT ADMISSIONS

Summer 2024—United States Tax Court.

January 2023—United States Patent and Trademark Office.

Fall 2025—United States District Court, Southern District of Texas.

Varying other state and local admissions (may be available upon request).

CERTIFICATIONS

February 2026—Austin, Texas. *Certified Mediator* legal professional responsibilities include the completion of the Basic (40-Hour Course) in mediation as an alternative dispute resolution and serving as neutral third party trained and authorized to facilitate structured negotiations between disputing parties, with the professional responsibility to promote voluntary,



informed, and good-faith settlement discussions while maintaining impartiality, confidentiality, and adherence to applicable mediation standards and ethical rules.

Fall 2025—Houston, Texas. *Public Notary* legal professional responsibilities include serving as an impartial witness to the execution of documents, verifying the identity of signatories, administering oaths and acknowledgments, and deterring fraud by ensuring that signatures are made knowingly, willingly, and in compliance with applicable law.

INDEPENDENCE

- i. August 2018 to *Present*—Muslim Bar Association of Houston – *Board of Directors, Webmaster*;
- ii. Inactive—Houston, Texas. *Undisclosed Not for Profit Corporation* for the social purpose of financial education & literacy using advocacy and social policy (in development).

MEMBERSHIPS

- i. April 2022 to *Present*—State Bar of Texas, *Member*;
- ii. June 2022 to *Present*—New York State Bar Association, *Member*;
- iii. April 2022 to *Present*—American Bar Association, *Member*; and
 - i. April 2022 to *Present*—State Bar of Texas, Tax Section, *Member*;
 - ii. June 2022 to *Present*—New York State Bar Association, Section of Taxation, *Member*;
 - iii. April 2022 to *Present*—American Bar Association, Section of Taxation, *Member*;
- iv. March 2017 to *Present*—Houston Young Lawyers Association, *Member*;
- v. August 2018 to *Present*—Muslim Bar Association of Houston, *Member*; and,
- vi. May 2018 to *Present*—Harris County, *Frequent Visitor*.

VOLUNTEER EVENTS

- i. Spring 2026 to *Present*—American Bar Association, Section of Taxation, *Volunteer Credentialed Tax Professional for Virtual Settlement Week*
- ii. March 2023 to *Present*—Houston Bar Association, Houston Volunteer Lawyers, *Volunteer Tax Attorney*
- iii. March 2018 to *Present*—Volunteer Income Tax Assistance Program, *Volunteer Tax Preparer*; and,
- iv. March 2017 to *Present*—Houston Bar Association, Eikenberg Fun Run, *Participant*.

PUBLICATIONS

FIRM PUBLICATIONS

- i. Who We Are;
- ii. What We Practice;
- iii. When We Practice;
- iv. Where We Practice;
- v. How We Practice;
 - a. Our Firm Policies and Disclaimers;
 - i. Our Firm Data Practices;
 - ii. Our Firm Legal Practices;
 - iii. Our Firm Tax Practices; and
 - iv. Our Firm Billing Practices