

# Defending Taxpayers. Resolving Tax Disputes.

We strive to provide each client with good judgment, personalized legal services, and great results.



## Audits

McLaughlin Legal was formed in 2009 as a boutique San Diego tax law firm to provide responsive solutions for all civil and criminal tax issues. Since its beginning, McLaughlin Legal has focused on tax law, with an emphasis on tax litigation and tax controversy matters.

We represent clients at all phases of a tax dispute, including audits, protests, appeals, court litigation, and collection resolution matters. McLaughlin Legal's clients range from individuals to mid-sized businesses, and substantive tax issues involving income, estate and gift, international, sales and use, excise, and employment taxes. This experience is critical to achieving the best results, and our specialization sets us apart from other law firms. Some of the more common issues we handle include:

*Audits*    *U.S. Tax Court*    *Offers in Compromises*    *Trust Fund (Payroll)*  
*Appeals*    *CDP Hearings*    *Criminal Investigations*    *FTB, EDD, BOE Issues*  
*OVDP*    *Liens/Levies*    *Innocent Spouses*    *Sales & Use Tax*



## U.S. Tax Court

Our presence in Southern California has enabled us to create long-standing professional relationships with the local IRS, FTB, EDD, and BOE representatives. A specialized knowledge of the various California tax laws, combined with personal and professional relationships with State and Federal agencies, can be critical components in defending your rights.



## Criminal Tax

### *Kevan P. McLaughlin, Esq., LL.M (Tax)*

#### Founder and Managing Attorney

Kevan P. McLaughlin is the firm's founder, and focuses his practice on civil and criminal tax litigation and controversies. Mr. McLaughlin has received numerous awards, including *Super Lawyers Raising Star*, *San Diego Daily Transcript's* Top Young Attorney, *SDMetro Magazine's* Top Attorneys (Tax), *San Diego Attorney Journal* Rising Star of the Month, and *San Diego Business Journal's* Best of the Bar. Mr. McLaughlin frequently writes and lectures on various tax law topics, has chaired the San Diego County Bar Association's Section of Taxation and the San Diego Chapter of the Young Tax Lawyers of the California State Bar Taxation Section, and served as the *California Journal of Tax Litigation* Editor.



**Free Consultations (858) 678-0061**

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# Representation by tax attorneys who care about getting the best possible results.

Providing the resources of a large law firm while maintaining the personalized service and cost-effectiveness of a small firm.

## Why McLaughlin Legal?

The tax attorneys at McLaughlin Legal are qualified and experienced in all types of tax law matters. Our firm is not all things to all clients, nor are we a billboard, bus-stop, or “late night TV ad” type firm. McLaughlin Legal is a specialized law firm that defends taxpayers and resolves all types of civil and criminal tax disputes. Whether defending your rights during an IRS audit, before the U.S. Tax Court, or helping you resolve a tax bill you cannot afford to pay, McLaughlin Legal’s concentrated practice, specialized knowledge and experience, personalized service, and commitment to each client sets us apart from the rest.

## Confidence in our concentrated area of law.

McLaughlin Legal’s core is its civil and criminal tax litigation and controversy practice. By concentrating our practice, we can offer the same resources of larger law firms with personalized and cost-effective services. Whether you have an issue with the IRS, FTB, EDD, or BOE, you can remain confident in the best representation in this specialized area of the law.

*“the power to tax carries with it the power to embarrass and destroy”*

U.S. Supreme Court Associate  
Justice Willis Van Devanter

## Personalized attention to your case.

McLaughlin Legal knows that each client’s goals, objectives, and issues are unique. We pride ourselves on a personalized approach to each client’s case and responsiveness to their needs.

## Committed to protecting your rights.

We are committed to achieving the best result possible for each client who entrusts us with their case.

### Personalized

McLaughlin Legal knows that each client’s interests, needs, and styles are unique to their case. We believe in having a strong personal relationship with each individual client.

### Specialized

We prioritize expertise. Our firm practices the very specific discipline of tax law, and we believe this focus is key to our success. When a client needs tax law services, we can match the level of service of any other law firm.

### Committed

We believe that being responsive, trustworthy, patient, professional, and honorable are the foundations of a successful law firm. Our firm is driven by the highest commitment to protecting our clients’ rights and achieving the best results possible.

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Build a detailed estate plan for peace of mind and provide for future generations.

Estate planning is a process that involves decisions about people and assets. Your estate plan may include **Wills and Trusts** or other documents that give rights and authority to others like a **Power of Attorney**. Whether you are concerned with determining how and to whom your assets will pass, minimizing **Estate Taxes**, avoiding **Probate**, addressing **Estate Administration Issues**, or deciding how your personal care will be managed if you become unable to care for yourself, the attorneys at McLaughlin Legal are here to help.



## ESTATE PLANNING: Make the Move to Protect the Ones You Love.

There's no better time to start than today. What's your reason?

**Anne E. Wenger, Esq.**  
Attorney at Law

Anne Wenger handles all types of Federal and California tax law issues, with a focus on the firm's tax and estate planning practice. Ms. Wenger advises clients with regard to their fundamental estate plans (Trust, Wills, Durable Powers of Attorney and Advance Health Care Directives), as well as assists her clients in evaluating and implementing various tax strategies to help protect and preserve their assets. Ms. Wenger is a graduate of the University of Notre Dame and the Gonzaga University School of Law where she graduated *Magna Cum Laude*.

*"Planning is bringing the future into the present so that you can do something about it now."*

Alan Lakein



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what's your reason?



## Estate planning is a process, but a vital one.

There is a misconception that estate planning involves simply writing a will. Although a will is part of an estate plan, McLaughlin Legal advises clients on the other critical components of a comprehensive plan. Only through this process can clients adequately plan for how and to whom their assets will pass, who will make decisions in the case of incapacity, minimize the effects of estate taxes, and achieve other important goals.

McLaughlin Legal knows that each client's goals and objectives are unique. Our attorneys pride themselves on a personalized approach to this specialized area of the law, combined with an unwavering commitment to our clients.

## Your most commonly asked questions about planning an estate. Answered.

### What is an estate plan?

A typical estate plan consists of a group of documents that work together to accomplish any number of goals involving you and your family's finances, healthcare, childcare, and death. Each document is critical in its own right, but must also be properly drafted to work in conjunction with the other documents.

### If I have a Will, do I need a Trust?

Like a Will, a Trust creates guidelines for the distribution of your assets. However, unlike a Will, a Trust avoids probate, as long as the Trust is properly executed and funded. Trusts can also be utilized to minimize potential tax burdens. Among all of the documents in your estate plan, the Trust is the master document.

### Why do I want to avoid Probate?

Probate is the court-supervised distribution of a decedent's assets, and may become necessary if there is no or poor planning. The typical probate of an estate can draw out anywhere between 6 to 18 months because every action must be overseen and approved by the court. There is a *mandatory* fee based off the total value of the assets in the estate. Finally, Probate is a matter of public record; therefore all information regarding your assets, debts, and property distribution is available to the public.

### How do I protect my children?

A properly drafted Trust in conjunction with a valid Will and Nomination of Guardians will ensure that your children are cared for in the manner of your choosing, and by the people you trust.

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