



## ROBERT LEWIS JACKSON

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### EDUCATION

New York University School of Law  
(LL.M., Taxation, 1966)

Yale Law School  
(LL.B., 1965)

Yale College  
(B.A., 1962)

### PRACTICE AREAS

Tax  
Security Clearance Services  
Future Energy Group

### ADMITTED TO BAR

Missouri  
District of Columbia  
Oklahoma

### PROFESSIONAL ACTIVITIES

The Missouri Bar  
District of Columbia Bar  
Oklahoma Bar Association  
Lorman Education Services (Speaker)

### CIVIC & CHARITABLE ACTIVITIES

First Unitarian Church of St. Louis,  
Missouri (Board of Trustees, 1989-1991)

### LAW PRACTICE

Bob Jackson is leader of the Tax, Employee Benefits, and Trust & Estates practice, a group he established when he joined the firm in 1969. He develops strategies with businesses, individuals, and non-profit entities to maximize their resources, sustain profitable growth, and reduce tax obligations.

Bob counsels all types of businesses on compliance issues, including audits, ruling requests, and enforced collections of tax delinquencies. He is well-versed in IRS procedures and methodically and persistently uses that knowledge to sort out tax liability issues. In one example, he managed and successfully settled one client's federal estate tax audit involving more than \$20 million in disputed taxes.

For clients who wish to protect themselves in the event of an audit, Bob issues tax opinion letters to assist them in operating according to tax law. His insights have been instrumental in advice for an underwriter who wanted to ensure that interest on securities would be deductible and for a client who enjoyed a rental deduction due to REIT rules.

Not-for-profit organizations that contend daily with maintaining and managing their tax-exempt status look to Bob for assistance in applying for 501(c)(3) exemptions and in preparing annual Form 990 returns. He also counsels them during audits to help preserve exemptions and provide peace of mind.

Bob handles individuals' personal legal needs including advice and transactions related to taxes, trusts, estate plans, probate avoidance, and other personal affairs. And when the unexpected or unplanned occurs, he uses post-mortem techniques and tools to increase the amount passed to the decedent's surviving family.

### SIGNIFICANT ACCOMPLISHMENTS

*The Best Lawyers in America* (15+ consecutive years, including the most recent edition) for Tax Law

2008-2009 *Missouri/Kansas Super Lawyers*®

AV® Peer Review Rated, *Martindale-Hubbell*

### BACKGROUND

Prior to joining the firm, Bob served on the tax faculty at New York University School of Law and clerked at the U.S. Tax Court.

### PRESENTATIONS & PUBLICATIONS

Author, "BNA portfolio on Subchapter J-Throwback Rules" (since rewritten by another author)

Speaker, "Nuts and Bolts of 401(k) Plans in Missouri," sponsored by *Lorman Education Services* (2002-2003)

