



Agenda

Office of Tax Appeals Hearings
Thursday, September 23, 2021, 9:30 a.m.
400 R Street
Hearing Room
Sacramento, CA 95811

(Agenda updated as of 09/09/21, 10:47 a.m.)

Franchise and Income Tax Appeals Hearing

La Paloma Nevada Trust, 18010922

Panel Lead:

Sara Hosey

Panel Members:

Mike Le

Tommy Leung

Appearing for Taxpayer:

R. Todd Luoma, Attorney

B. Burger, Witness

J. Wilson, Witness

A. Sharif, Witness

A. Skarsgard, Witness

Appearing for Franchise Tax Board:

Sonia Woodruff, Tax Counsel

Desire Macedo, Tax Counsel

Issue: Whether appellant has met their burden of proof as to qualifying for tax deferred treatment regarding the real property on La Paloma Road in Los Altos, California, pursuant to Internal Revenue Code section 1031(a).

The following cases were removed from this agenda:

M. Lockett, 20025860

Taxpayer and FTB requested this case be deferred.

Yogurt Time, LLC, 18011830,18012048

Taxpayer requested a postponement.

Z. Andesha, Z. Rashid and

Taxpayers waived hearing.

R. Rashid, 19125640

The hearing location is accessible to people with disabilities. Please contact Mike Singh at (916)216-0097, or email Mike.Singh@ota.ca.gov if you require special assistance.

Note: The above case description is intended simply to inform the public and the press as to the general subject matter of the case. The description does not necessarily define the specific issues that will be addressed at the hearing.