Agenda

Office of Tax Appeals Hearings
Thursday, March 16, 2023, 9:30 a.m.
12900 Park Plaza Dr.
Suite 300
Cerritos, CA 90703

(Agenda updated as of 03/03/23, 9:59 a.m.)

Franchise and Income Tax Appeals Hearings

J. Smith, 22029629, 220310040
Panel Lead:	Asaf Kletter
Panel Members:	Sara Hosey
	Keith Long
Appearing for Taxpayer:	Richard Stack, Attorney
Appearing for Franchise Tax Board:	Joel Smith, Tax Counsel
	Jackie Zumaeta, Tax Counsel

Issue: Whether the statute of limitations bars appellant's claim for refund for the 2012 through 2015 tax years.

1:00p.m. session

R. Pack, 18010026
Panel Lead:	Sara Hosey
Panel Members:	Joshua Lambert
	Cheryl Akin
Appearing for Taxpayer:	A. Lavar Taylor, Attorney
	Lisa Nelson, Attorney
Appearing for Franchise Tax Board:	Brad Coutinho, Tax Counsel
	Jackie Zumaeta, Tax Counsel

Issue: Whether appellant has established that he timely filed his appeal such that the Office of Tax Appeals has jurisdiction to decide the appeal.

The following cases were removed from this agenda:

M. Saxon, 20036049	FTB requested deferral of this case.
M. Waksberg, 18042709	Taxpayer requested a postponement.
W. Steffier, 20076326	OTA determined this case needed additional development prior to hearing.

The hearing location is accessible to people with disabilities. Please contact Nia Vaughan at (916)926-3048, or email Nia.Vaughan@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.

Mail: P.O. Box 989880
West Sacramento, CA 95798-9880
Phone: (916) 492-2635

Web: ota.ca.gov

Location: 400 R Street
Sacramento, CA 95811
Fax: (916) 492-2089