

**GEORGE L. WILLIS**  
**Clinical Professor and**  
**Director of the Tax Law Clinic**

**EDUCATION**

CHAPMAN UNIVERSITY SCHOOL OF LAW  
J. D. WITH TAXATION EMPHASIS, 1998

CALIFORNIA STATE UNIVERSITY, LONG BEACH  
B. A., FINANCE, REAL ESTATE AND LAW, 1991

**PROFESSIONAL EXPERIENCE**

**Law Instruction:**

1999 to Present      **CHAPMAN UNIVERSITY SCHOOL OF LAW**, Orange, California  
CLINICAL PROFESSOR (2016-PRESENT);  
ASSOCIATE CLINICAL PROFESSOR (2005-2016);  
DIRECTOR, TAX LAW CLINIC (2005-PRESENT);  
ADMINISTRATOR, LL.M. IN TAXATION (2007-PRESENT);  
ADMINISTRATOR, TAX LAW CLINIC (1999-2004)  
Position consists of teaching Tax Law Clinical Education courses,  
securing and administering ongoing federal grants, and administering  
graduate tax law programs along with expected co-curricular and law  
school committee work.

**Legal Experience:**

1998 - 2005      **LAW OFFICE OF GEORGE L. WILLIS**  
Tustin, California  
ATTORNEY-OWNER  
Established and maintained a private law practice with an emphasis in  
estate planning, business planning, tax controversies and related matters.

1997              **INTERNAL REVENUE SERVICE**, Estate & Gift Tax Div.,  
Santa Ana, California  
LEGAL EXTERNSHIP  
Externship under the Division Manager. Extensive exposure to Family  
Limited Partnerships and fraudulent transfer issues.

1996              **FIRST AMERICAN CORPORATION**,  
Santa Ana, California  
LAW CLERK  
Law Clerk to the General Counsel. In addition to research and writing,  
worked on a variety of title litigation and title bankruptcy matters.

## UNIVERSITY SERVICE AND FACULTY COMMITTEE WORK

**University Graduate Academic Council**, Member, 2018-2019, 2017-2018, 2016-2017

**Law School Academic Standards Committee**, Member, 2017-2018

**Law School Budget Committee**, Member, 2016-2017, 2009-2010, 2007-2008, 2006-2007

**Externships & Clinics Committee**, Member: 2015-2016, 2011-2012, 2005-2008; Chair: 2006-2007; Ex-Officio: 2009-2010, 2008-2009

### **Faculty Advisor to Student Organizations:**

*Air and Space Law Society*, 2017-2018, 2015-2016, 2014-2015

*Tax Law Society*, 2016-2017, 2013-2014, 2012-2013, 2011-2012, 2006-2007

*Music Law Society*, 2010-2011

*Real Estate Transactions Student Organization*, 2009-2010

*Law Student Courier*, 2007-2008

**Faculty Appointments Committee**, Member, 2014-2015

**Law School Honor Council Committee**, Member, 2012-2013

**State Bar CLE Compliance Officer for the University**, 1999-2012

**J.D. Admissions Committee**, Member, 2010-2011

**Budget Committee**, Member, 2009-2010, 2007-2008, 2006-2007

**Pro Bono Committee**, Member, 2008-2009

**Job Search Committees**, Member, Assistant Registrar (2011), Career Services Director (2008), Development Director (2006)

**Graduation Committee**, Member, 2005-2007

**Ad Hoc Development Committee**, Member, 2009-2010, 2008-2009

**Ad Hoc Committee on the University's Website**, Member, 2006-2007

## EXTERNAL SERVICE & COMMITTEE WORK

**Chapter Co-Author:** "*Effectively Representing Your Client Before the IRS*," Chapter 7: Power of Attorneys. (2017)

**Chapter Author:** "*Advocating for Low Income Taxpayers: A Clinical Studies Casebook*," Chapter 12: Litigation of Tax Matters for Low Income Taxpayers. (Rev. 2009 & 2011)

**Chapter Editor:** "*Effectively Representing Your Client Before the IRS: A Practical Manual for the Tax Practitioner*," Chapter 5: Securing Information from the IRS. (Rev. 2011.)

**Pro Bono & Tax Clinics Committee (formerly the Low Income Taxpayer Committee), American Bar Association Section of Taxation**

Member: 1999-present

Committee Leadership: Moderator of the Committee's listserv (2005-present), Immediate (Jr.) Past Chair (2014-2015), Chair (2013-2014), Vice Chair (2009-2013)

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Author or Contributing Author:

ABA official comments on Proposed IRS Regulations Regarding ITIN's (2017)  
ABA official comments on Reforming Tax Administration (2014)  
ABA official comments on Proposed Changes to IRS Innocent Spouse Regulations (2014)  
ABA official comments on IRS Form SS-8 (2013)  
ABA official comments on IRS Form 911 (2012)  
ABA official comments on Rev. Proc. 2003-61 (2012)  
ABA official comments on IRC §6103, Disclosure of Returns & Return Information (2012)  
ABA official comments on Tax Return Preparer Regulations under Circular 230 (2011)  
ABA official comments on Truncation of Tax ID Numbers on Payee Statements (2010)  
ABA official comments on Proposed Regulations for Tax Return Preparer Penalties (2008)  
ABA official comments on Proposed Regulations for Partial Payment Installments (2007)  
ABA official comments on revisions to IRS Form 8857 (2006)  
ABA official comments on Earned Income Tax Credit Precertification (2003)

Committee Member:

Low Income Taxpayer Committee Member (1999-2008)  
Task force on pro bono referral panels (2006)  
Joint Tax force (ABA & US Tax Court) evaluating interpreters at Tax Court Trials (2004)

Panelist or Moderator:

Various conferences and symposia listed *infra* (2001-2016)

**Ninth Circuit Court of Appeals *Pro-Bono* Panel**

Standing committee member overseeing federal appeals court cases involving matters of income tax and estate and gift taxation.

**PRESENTATIONS/NOTES/MEDIA QUOTES**

**New Approaches and Alternatives to Innocent Spouse Relief**

Sponsor: American Bar Association  
Event: Tax Section meeting, Los Angeles, CA, Jan 2016

**Advanced IRS Collections Topics - CDP Litigation & Remand**

Sponsor: IRS Office of the National Taxpayer Advocate  
Event: LITC Grant Conference & Training Workshop, Washington, DC, Dec 2015

**Communicating With Third Parties (for Your Clients)**

Sponsor: American Bar Association  
Event: Tax Section meeting, Washington, DC, May 2014

**About Chapman's Tax Law Clinic**

Sponsor: California Bar Tax Procedure & Litigation Committee  
Event: Newsletter Article, February 2013

**Assisting Clients Who Have Experienced Domestic Violence & Abuse**

Sponsor: Internal Revenue Service  
Event: IRS National Tax Forums, San Diego, CA, July 2012

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**Taxpayer Rights: Helping Your Clients Understand**

Sponsor: Internal Revenue Service  
Event: IRS National Tax Forums, San Diego, CA, July 2012

**Using IRS e-Services (Moderator and Panelist)**

Sponsor: American Bar Association  
Event: Tax Section meeting, Washington DC, May 2011

**IRS Whistleblower Claims (Moderator)**

Sponsor: American Bar Association  
Event: Tax Section meeting, Boca Raton, FL, January 2011

**Volunteer Preparers' Accuracy Rises, but Budget May Threaten Program**

Sponsor: Tax Notes Today  
Event: Article on cuts to taxpayer services, October 26, 2010 (2010 TNT 206-6)

**Taxing Private Ryan (Moderator)**

Sponsor: American Bar Association  
Event: Tax Section meeting, Washington, DC, May 2010

**Representing Pro Se Taxpayers at Tax Court Calendar Call**

Sponsor: American Bar Association  
Event: Tax Section meeting, Chicago, IL, September 2009

**Requesting Information from the IRS (Moderator)**

Sponsor: American Bar Association  
Event: Tax Section meeting, Chicago, IL, September 2009

**Left Brain Thinking for Lawyers**

Sponsor: Whittier Law School and So. Cal. ABA Law Schools (Joint Sponsors)  
Event: Orange County Law Firm Practice Day, Costa Mesa, CA, October 2008

**Tax Aspects of Identity Theft (Moderator)**

Sponsor: American Bar Association  
Event: Tax Section meeting, San Francisco, CA, September 2008

**More ABC's of Tax Liens and Levies**

Sponsor: American Bar Association  
Event: Tax Section meeting, San Diego, CA, February 2006

**Effect of Frozen Refunds on Taxpayers**

Sponsor: KPFA 94.1 FM Radio (San Francisco)  
Event: Morning Show, January 2006

**ABC's of Tax Liens and Levies**

Sponsor: American Bar Association  
Event: Tax Section meeting, San Francisco, CA, September 2005

**Use of Individual Tax ID Numbers (Moderator)**

Sponsor: Midwest Association of Farm Workers Organization  
Event: National Farmworker Conference, Anaheim, CA, March 2005

**The Traps in Amnesty for Taxes**

Sponsor: San Francisco Chronicle  
Event: Newspaper article on FTB Amnesty, February 3, 2005

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**Best Practices: A Model Tax Controversy Clinic**

Sponsor: Internal Revenue Service

Event: Taxpayer Advocate Tech. Training Conference, Los Angeles, CA, July 2004

**Handling Unique Collections Due Process Cases and Taxpayers**

Sponsor: Internal Revenue Service

Event: Taxpayer Advocate Tech. Training Conference, Los Angeles, CA, July 2004

**How to Handle a Tax Court Case**

Sponsor: American Bar Association & American University School of Law

Event: Low Income Taxpayer Clinic Conference, Washington, DC, May 2004

**Written Testimony Before the U.S. Congress**

Sponsor: U.S. House of Representatives, House Ways and Means Committee

Event: Testimony on ID theft, misuse of SSN's and TIN's, March 2004

**Regulation of Tax Return Preparers**

Sponsor: American Bar Association

Event: Tax Section Meeting, Chicago, IL, September 2003

**Tax Clinic Ethics and Standards of Tax Practice (Moderator)**

Sponsor: Internal Revenue Service

Event: Low Income Taxpayer Clinic Conference, Los Angeles, CA, December 2002

**Estate Planning Under EGTRA**

Sponsor: The Heritage Society of Orange County

Event: Fall Meeting, Orange, CA, September 2001

**CONTINUING EDUCATION**

**Orange County Bar Assoc. Sections on Probate, Trusts, Estates and Taxation**

Attendee, monthly section meetings and continuing education, 1999-2018

**American Bar Association Section of Taxation**

Presenter and attendee, national section and committee meetings, 1999-2016

**California Bar Association Section of Taxation**

Attendee, state section meetings and continuing education, 1999-2001, 2008-2011, 2013

**U.S. Tax Court Judicial Conference**

Distinguished attendee, national conference, 2005, 2007, 2009 & 2015

**IRS National Tax Forums**

Presenter and attendee, national seminar continuing education for tax practitioners, 2000-2002, 2005, 2008-2009, 2011

**National Conference of Bar Examiners & Assoc. of American Law Schools**

Attendee, joint working group conference on bar admissions, 2004

**BAR ADMISSIONS**

**California Supreme Court (1998)**

**United States District Court, Central District of California (1998)**

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**United States Tax Court** (1999)

**United States Court of Appeals:**

*7th Circuit* (2004)

*9th Circuit* (2000)

*11th Circuit* (2004)

*Military Appeals* (2003)

*Veterans Claims* (2006)

**United States Supreme Court** (2003)

## **OTHER BAR AFFILIATIONS**

**American Bar Association**, 1996-Present

*Sections:* Real Property Probate Trusts & Estates, Taxation & various subcommittees

**California Bar Association**, 1998-Present

*Sections:* Taxation

**Orange County Bar Association**, 1999-Present

*Sections:* Estates Trusts & Probate, Taxation

## **OTHER CERTIFICATIONS**

**Graduate Certificate in Mortgage Banking**, 1997

California State University Fullerton, Fullerton, California

**Graduate Certificate in Legal Assistantship**, 1994

University of California Irvine, Irvine, California