

Joseph R. Irvine, MS, JD, CPA
7409 Hampsted Sq. S.
New Albany, Ohio 43054
(614) 805-7575

EDUCATION

DUKE UNIVERSITY SCHOOL OF LAW
Juris Doctor, High Honors

UNIVERSITY OF CINCINNATI
Masters of Science in Taxation

KENT STATE UNIVERSITY
Bachelors of Business of Administration.
Suma Cum Laude

EMPLOYMENT

- 2012- present Senior Lecturer in Law – The Ohio State University. Full responsibility for teaching two undergraduate courses and one graduate course in business law.
- 1995- 2012 Development and Tax Counsel – The Ohio State University. Responsibilities include providing tax advice to all areas of the University, implementing tax savings strategies, answering compliance-related questions, and managing clerk program.
- 1996-2012 Adjunct Faculty - The Ohio State University. Full responsibility for teaching courses in business law.
- 1990-1995 Senior Associate - Porter, Wright, Morris and Arthur. Provided tax planning and litigation involving Federal and state tax issues for a wide range of clients. Also responsible for developing new clients, billing for legal services, and supervising attorneys and staff.
- 1987-1990 Partner - Norman, Jones, Enlow & Co. Responsible for firm tax practice, including coordination of tax research, consultation with firm personnel and clients regarding various tax issues, review of all tax research and opinions, representation in tax audits and appeals and monitoring tax legislation.

1986-1987	Associate - Bricker & Eckler. Handled tax litigation involving state and local taxes, designed and implemented employee benefit plans and did tax planning and research.
1982-1983	Graduate Assistant - University of Cincinnati. Fully responsible for two sections of financial accounting courses each quarter.
1979-1982	Senior Accountant - Deloitte. Responsible for supervision of two staff accountants, tax research and planning, review of tax returns and retirement planning.
1977-1978	Resident Advisor and Academic Advisor - Kent State University. Communicated and enforced university policies, conducted group presentations and advised students regarding academic requirements.
HONORS	Law School Merit Scholarship, Beta Gamma Sigma, Mortar Board, Accounting Department Scholarship, Sheri Jo Luft Memorial Award NACUBO Tax Award. Max M. Fisher Faculty Eminence Award Included in The Princeton Review publication "The 300 Best Professors"
PUBLICATIONS	<i>Proposed FICA Regulations Go Far Beyond A Response To Mayo</i> 16 <i>Taxation of Exempts 8</i> (2004). <i>Does Exclusivity Create Liability for UBIT?</i> 14 <i>Taxation of Exempts 19</i> (2002). <i>Ohio Sales and Use Tax</i> . (1990-2000). <i>Ohio Franchise Tax</i> . (1992). <i>Ohio Tax Update</i> . (1993). <i>Multistate Tax Issues</i> . (1993). <i>Ohio Franchise Tax</i> . (1994). <i>Ohio Tax Update</i> . (1996-2002).
PROFESSIONAL ACTIVITIES	Certified Public Accountant, Ohio. Admitted to practice law in all Ohio courts and the Southern District of Ohio. American Institute of CPAs, past Tax Lead for National Not for Profit Industry Conference Planning Committee. National Association of College and University Business Officers, former Taxation Council member and past chair. National Association of College and University Attorneys, past chair of Taxation Section Ohio State Bar Association Academy of Legal Studies in Business.

University of Texas Higher Education Tax Institute, Planning Committee member (2014-2022) and co-chair 2021 and 2022

RECENT PRESENTATIONS

- Irvine, J. (Moderator/Presenter), Higher Education Taxation Institute, University of Texas at Austin, Live In Person, "Ask the Experts". (June 2023).
- Irvine, J. (Presenter & Author), NACUBO Unrelated Business Income Tax Conference, Live In Person, "Corporate Sponsorships". (March 2023).
- Irvine, J. (Presenter & Author), NACUBO Unrelated Business Income Tax Conference, Live In Person, "Corporate Sponsorships-Case Studies". (March 2023).
- Irvine, J. (Presenter & Author), NACUBO Higher Education Accounting Forum, Live In Person, "Corporate Sponsorships". (April 2023).
- Irvine, J. (Presenter & Author), Higher Education Taxation Institute, University of Texas at Austin, Live In Person, "Charitable Contributions". (June 2022).
- Irvine, J. (Co-presenter & Author), Higher Education Taxation Institute, University of Texas at Austin, Live In Person, "Qualified Sponsorship or Advertising: You Make the Call". (June 2022).
- Irvine, J. (Co-presenter & Author), Live Online Presentation, Higher Education Taxation Institute, University of Texas at Austin, "Select Topics in Charitable Contributions Including Gift Acceptance and Naming Policies". (June 2021).
- Irvine, J. (Moderator), Live Online Presentation, Higher Education Taxation Institute, University of Texas at Austin, "What's New in the World of Compensation and Benefits".(August 2020)
- Irvine, J. (Co-presenter & Author), Oral Presentation, National Association of College and University Business Officers, "The Year in Tax". (October 2019).
- Irvine, J. (Co-presenter & Author), Oral Presentation, Higher Education Taxation Institute, University of Texas at Austin, "Tax and Legal Issues Related to Charitable Contributions". (June 2019).

- Irvine, J. (Co-presenter & Author), Oral Presentation, Higher Education Taxation Institute, University of Texas at Austin, "Charitable Contributions". (June 2019).
- Irvine, J. (Co-presenter & Author), Oral Presentation, National Association of College and University Business Officers, "Unrelated Business Income Tax Fundamentals". (February 2019).
- Irvine, J. (Co-presenter & Author), Oral Presentation, National Association of College and University Business Officers, " Qualified Sponsorship Payments or Advertising". (February 2019).
- Irvine, J. (Co-presenter & Author), Oral Presentation, National Association of College and University Business Officers, "The Year in Tax". (October 2018).
- Irvine, J. (Co-presenter & Author), Oral Presentation, Higher Education Taxation Institute, University of Texas at Austin, "Analyzing Fringe Benefits". (June 2018).
- Irvine, J. (Co-presenter & Author), Oral Presentation, National Association of College and University Business Officers, "The Year in Tax". (October 2017).
- Irvine, J. (Co-presenter & Author), Oral Presentation, National Association of College and University Business Officers, "Tax Issues for Highly Compensated Employees". (October 2017).
- Irvine, J., National Association of College and University Business Officers, (Co-presenter & Author), Webcast, "Update on Tax Reform". (July 2017).
- Irvine, J. (Co-presenter & Author), Oral Presentation, American Institute of CPAs, "Unrelated Business Income Tax". (June 2017).
- Irvine, J. (Co-presenter & Author), Oral Presentation, Higher Education Taxation Institute, University of Texas at Austin, "Unusual Charitable Contributions". (June 2017).
- Irvine, J. (Co-presenter & Author), Oral Presentation, National Association of College and University Business Officers, "Tax Update". (May 2017).
- Irvine, J. (Co-presenter & Author), Oral Presentation, National Association of College and University Business Officers, "Qualified Sponsorship Payments or Advertising". (February 2017).

- Irvine, J. (Co-presenter & Author), Oral Presentation, National Association of College and University Business Officers, "UBIT Fundamentals: What You Don't Know Can Hurt You". (February 2017).
- Irvine, J. (Co-presenter & Author), Oral Presentation, Tax Forum, National Association of College and University Business Officers, "Nonqualified Deferred Compensation", Conference. (September 2016).
- Irvine, J. (Co-presenter & Author), Oral Presentation, Tax Forum, National Association of College and University Business Officers, "Managing Tax Risks with Athletic Departments", Conference. (September 2016).
- Irvine, J. (Co-presenter & Author), Oral Presentation, Tax Forum, National Association of College and University Business Officers, "The Year in Tax", Conference. (September 2016).
- Irvine, J. (Co-presenter & Author), Oral Presentation, Higher Education Taxation Institute, University of Texas at Austin, "Tax Issues Facing Athletic Departments", Conference. (June 2016).
- Irvine, J. (Co-presenter & Author), Oral Presentation, Higher Education Taxation Institute, University of Texas at Austin, "Charitable Contributions", Conference. (June 2016).
- Irvine, J. (Presenter & Author), Oral Presentation, Tax Forum, Southern Association of College and University Business Officers, "Higher Education Tax Update", Conference. (April 2016).
- Irvine, J. (Co-presenter & Author), Oral Presentation, Tax Forum, National Association of College and University Business Officers, "Taxation of Tuition Benefits", Conference. (October 2015).
- Irvine, J. (Co-presenter & Author), Oral Presentation, Tax Forum, National Association of College and University Business Officers, "The Year in Tax", Conference. (October 2015).
- Irvine, J. (Co-presenter & Author), Oral Presentation, Tax Forum, National Association of College and University Business Officers, "On the Go: Telework, Travel and Moving Expenses", Conference. (October 2015).
- Irvine, J. (Presenter & Author), Oral Presentation, Not For Profit Conference, American Institute of CPAs, "UBIT: How the Insiders Do It", Conference. (June 2015).

Irvine, J. (Presenter & Author), Oral Presentation, Higher Education Taxation Institute, University of Texas at Austin, "UBIT Basics and Qualified Sponsorships", Conference. (June 2015).

Irvine, J. (Discussion Leader), Oral Presentation, Not For Profit Conference, American Institute of CPAs, "UBIT Analysis", Conference. (June 2015).

Irvine, J. (Presenter & Author), Webcast, National Association of College and University Business Officers, "Qualified Sponsorships" (May 2015).

Irvine, J. (Case Study Discussion Leader), Oral Presentation, Unrelated Business Income Tax, National Association of College and University Business Officers, "Agency Relationships", Conference. (February 2015).

Irvine, J. (Co-presenter & Author), Oral Presentation, Unrelated Business Income Tax, National Association of College and University Business Officers, "Expense Allocations", Conference. (February 2015).

Irvine, J. (Co-presenter & Author), Oral Presentation, Unrelated Business Income Tax, National Association of College and University Business Officers, "Net Operating Losses", Conference. (February 2015).

Irvine, J. (Co-presenter & Author), Oral Presentation, Tax Forum, National Association of College and University Business Officers, "Fringe Benefits", Conference. (September 2014).

Irvine, J. (Co-presenter & Author), Oral Presentation, Tax Forum, National Association of College and University Business Officers, "Tax Update", Conference. (September 2014).

Irvine, J. (Presenter & Author), Oral Presentation, Not For Profit Conference, American Institute of CPAs, "Qualified Sponsorship", Conference. (June 2014).

Irvine, J. (Presenter & Author), Oral Presentation, Not For Profit Conference, American Institute of CPAs, "Structuring a Tax Department", Conference. (June 2014).

Irvine, J. (Co-presenter & Author), Oral Presentation, Higher Education Taxation Institute, University of Texas at Austin, "Charitable Contribution Compliance", Conference. (March 2014).

Irvine, J. (Presenter & Author), Oral Presentation, Higher Education Taxation Institute, University of Texas at Austin, "Qualified Sponsorships", Conference. (March 2014).

REFERENCES Available on request.