Lisa M. Blum

Telephone: 502-852-4823

Email: lisa.blum@louisville.edu

Education and Professional Credentials

- LL.M. Taxation, New York University School of Law, 2003
- J.D. State University of New York at Buffalo School of Law, 1992, Magna cum laude
- B.S. State University of New York at Buffalo, 1988, Summa cum laude, High Distinction
- B.A. State University of New York at Buffalo, 1988, Summa cum laude
- Member of the New York State Bar Admitted 1993
- Certified Public Accountant

Employment

- 1995 to Present: Instructor of Commercial Law and Accountancy, University of Louisville, College of Business
- 1993 to 1994: Adjunct Instructor, State University of NY at Buffalo, School of Management
- 1992 to 1995: Senior Tax Specialist, KPMR Peat Marwick, Buffalo, New York
- 1990 to 1992: Staff Accountant, Kane & Sabo, CPA's

Publications- Refereed Journals

- Coppage, R.E., Blum, L.M. (2009). Family Tax Savings Compound When a Parent Funds a Child's Roth IRA. *Practical Tax Strategies (April, 2009),* 212 219.
- Blum, L.M., Coppage, R.E. (2008). Beware of the "Active Participant" Wrinkle for IRA deductions. *Practical Tax Strategies*, 80(2), 94 – 92.
- Coppage, R.E., Blum, L.M. (2008). Location of Tax Home Determines Travel Expense Deductibility. *Practical Tax Strategies*, *81(1)*, *34 – 39*.
- Coppage, R.E., Blum, L.M. (2008). Implement Plans to Maximize Advantageous Roth IRA Opportunities. *Practical Tax Strategies*, *80(3)*, *132 138*.
- Coppage, R.E., Blum, L.M. (2007). BreakEven Point analysis Aids in Evaluating ROTH Conversions. *Practical Tax Strategies, 78(2), 83 – 89.*
- Coppage, R.E., Baxendale, S.J., Blum, L.M. (2006). Prepare to Benefit from Liberalized Roth IRA Conversion Rules. *Practical Tax Strategies, Sept. 2006.*
- Coppage, R.E., Baxendale, S.J., Blum, L.M. (2005). Jobs Act Increases Prospects for Roth IRA Conversions. *Practical Tax Strategies, Aug. 2005.*

- Coppage, Richard E.; Baxendale, Sidney J.; and Blum, Lisa M., "The Reduced Benefit of Contributing Intangibles After the 2003 Tax Act", 103 Tax Notes 347 (April 2004).
- Ivancic, Lisa M., and Coppage, Richard E., "Burden of Proof, Taxpayers Remained Burdened Despite Shifted Burden of Proof", 62 Practical Tax Strategies 284 (May 1999).
- Baxendale, Sidney J., Coppage, Richard E., and Ivancic, Lisa M., "Annual Gift Exclusion: Give Appreciated Property or Sell Appreciated Property and Give Cash?"; *11 Personal Financial Planning 19 (July 1999).*
- Ivancic, Lisa M.; Coppage, Richard E.; and Baxendale, Sidney J.; "Estate Planning Strategies, Estate Planning Remains Critical Despite Law Changes"; 62 Practical Tax Strategies 98 (February 1999).
- Coppage, Richard E.; Baxendale, Sidney J.; and Ivancic, Lisa M.; "The Increased Cost of Donating Appreciated Property After the Taxpayer Relief Act of 1997"; 82 Tax Notes 676 (February 1999).
- Ivancic, Lisa M. and Coppage, Richard. E.; "Bankruptcy and Taxes, Tax Planning Should Accompany Bankruptcy Filings"; 61 Taxation for Accountants 22 (July 1998). Reprinted in 27 Taxation for Lawyers 103 (September 1998).
- Baxendale, Sidney J.; Coppage, Richard E.; and Ivancic, Lisa M.; "Estate and Gift Planning After TRA '97"; 80 Tax Notes 943 (August 1998).
- Coppage, Richard E.; Baxendale, Sidney J.; and Ivancic, Lisa M.; "Capital Gain Tax Cut Has Charitable Donation Cost"; 60 *Taxation for Accountants 314 (May 1998)*.
- Coppage, Richard E.; Baxendale, Sidney J.; and Ivancic Lisa M.; "Minimize AGI Once to Maximize Roth IRA Break"; 60 Taxation for Accountants 132 (March 1998). Reprinted in 26 Taxation for Lawyers 354 (May 1998).

Courses Taught

- Advanced Taxation
- Introduction to Taxation
- Federal Taxation Masters of Accountancy Program
- Commercial Law for Professional Accountants Masters of Accountancy Program
- Legal Environment of Business
- Introduction to Financial Accounting
- Introduction to Managerial Accounting

Honors and Awards

- 2001 Service Award, College of Business
- 1999 Faculty Excellence Award, College of Business
- 1998 Undergraduate Teaching Award, College of Business
- 1997 Undergraduate Teaching Award, College of Business

Service

- 1997 2011: Chair Scholarships, Awards, and Honors Committee
- 2012: Member Undergraduate Studies Committee
- 2012: Advisor Coop Program