

Lisa Blum

University of Louisville

School of Accountancy

College of Business, Room 242

lisa.blum@louisville.edu

502-852-4823

Education

- LL.M. 2003 **New York University – School of Law**
Postgraduate Program in Law and Taxation
- J.D. 1992 **State University of New York at Buffalo – School of Law**
Magna cum laude
- B.S. 1988 **State University of New York at Buffalo**
Major: Accounting
Summa cum laude
- B.A. 1988 **State University of New York at Buffalo**
Major: Psychology
Summa cum laude

Professional Licenses

- 1993 – Present Member of the New York State Bar
- 1992 – Present Certified Public Accountant – New York State

Academic Experience

- 2021 – Present **University of Louisville, College of Business**
School of Accountancy
Assistant Professor of Practice - Accountancy
- 1995 – Present **University of Louisville, College of Business**
School of Accountancy
Instructor – Accountancy
- 1993 – 1994 **State University of New York at Buffalo**
School of Management
Adjunct Instructor

Courses Taught at the University of Louisville

Graduate Courses

- MAC 624: Corporate Taxation Online
- ACCT 624: Advanced Federal Taxation
- ACCT 631: Federal Taxation
- CLAW 624: Commercial Law for Professional Accountants

Undergraduate Courses

- ACCT 315: Introduction to Taxation- Traditional and online
- ACCT 415: Advanced Taxation – Traditional and online
- ACCT 490: Special Topics in Accounting
- CLAW 301: Legal Environment of Business – Traditional and online
- CLAW 301H: Legal Environment of Business - HONORS
- ACCT 201: Principles of Financial Accounting
- ACCT 202: Principles of Managerial Accounting

Service Activities at the University of Louisville

- 2019 – Present Technology Committee – Chair, School of Accountancy
- 2019 – Present Mentoring for Success, University of Louisville
- 2016 – Present Faculty Advisor – Beta Alpha Psi, Honorary Society for Accounting Students, School of Accountancy
- 2012 – Present Coop Committee – Accounting Faculty Representative, College of Business
- 2001 – Present Master of Accounting Program Committee, School of Accountancy
- 2000 – Present Tax Committee, School of Accountancy
- 2000 – Present Commercial Law Committee – Lead, College of Business
- 2017 – 2018 Assurance of Learning Committee, College of Business
- 2012 – 2016 Undergraduate Studies Committee – Accounting Faculty Representative, College of Business
- 2001 – 2002 Student Development Committee, Accounting Faculty Representative, College of Business
- 2000 – 2008 Joint MBA/JD Degree Program – Lead Coordinator, College of Business
- 1998 – 2005 Faculty Advisor – Alpha Kappa Psi, Professional Business Fraternity, College of Business
- 1997 – 2012 Scholarships, Honors, and Awards Committee – Chair, College of Business
- 1998 – 2002 Metro United Way Campaign – Faculty Liaison, College of Business
- 1996 – 1997 Faculty Grievance Committee – Accounting Faculty Representative, College of Business

Research Publications

Blum, L.M., Foster, B. (2021). "The Taxation of Nonfungible Token Transactions", *CPA Journal*, 91(5/6). 42-47.

Coppage, R.E., Blum, L.M. (2016). "In-Plan Roth Rollovers", *Strategic Finance*, 98(3), 15-16.

Coppage, R.E., Blum, L.M. (2009). "Family Tax Savings Compound when a Parent Funds a Child's Roth IRA", *Practical Tax Strategies* 82(4), 212 – 219.

Blum, L.M., Coppage, R.E. (2008). "Beware of the Active Participant Wrinkle for IRA Deductions", *Practical Tax Strategies*, 80(2), 84 - 91.

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 – 137.

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*, 77(3) 142 – 156.

Coppage, R.E., Baxendale, S.J., Blum, L.M. (2005). "Jobs Act Increases Prospects for Roth IRA Conversions", *Practical Tax Strategies*, 75(2), 99 – 108.

Coppage, R.E., Baxendale, S.J., Blum, L. M., (2004). "The Reduced Benefit of Contributing Intangibles After the 2003 Tax Act", *103 Tax Notes* 347 (April 2004).

Blum (Ivancic), L.M., Coppage, R.E., (1999). "Burden of Proof, Taxpayers Remain Burdened Despite Shifted Burden of Proof", *Practical Tax Strategies*, 62(5) 98 – 104.

Baxendale, S.J., Coppage, R.E., and Blum (Ivancic), L.M, (1999). "Annual Gift Exclusion: Give Appreciated Property or Sell Appreciated Property and Give Cash?", *11 Personal Financial Planning* 19 (July 1999).

Blum (Ivancic), L.M.; Coppage, R.E.; and Baxendale, S.J.; (1999). "Estate Planning Strategies, Estate Planning Remains Critical Despite Law Changes", *62 Practical Tax Strategies* 98 (February 1999).

Coppage, R.E.; Baxendale, S.J.; and Blum (Ivancic), Lisa M.; (1999). "The Increased Cost of Donating Appreciated Property After the Taxpayer Relief Act of 1997"; *82 Tax Notes 676 (February 1999)*.

Blum (Ivancic), L.M. and Coppage, R.E.; (1998). "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, S.J.; Coppage, R.E.; and Blum (Ivancic), L.M.; (1998). "Estate and Gift Planning After TRA '97", *80 Tax Notes 943 (August 1998)*.

Coppage, R.E.; Baxendale, S.J.; and Blum (Ivancic), L.M.; (1998). "Capital Gain Tax Cut Has Charitable Donation Cost", *60 Taxation for Accountants 314 (May 1998)*.

Coppage, R.E.; Baxendale, S.J.; and Blum (Ivancic), L.M.;(1998). "Minimize AGI Once to Maximize Roth IRA Break", *60 Taxation for Accountants 132 (March 1998)*. Reprinted in *26 Taxation for Lawyers 354 (May 1998)*.

Recognitions and Awards at the University of Louisville

2018 – 2019	Faculty Favorite Recognition
2016 – 2017	Faculty Favorite Recognition
2001	Faculty Service Award, College of Business
1999	Faculty Excellence Award, College of Business
1998	Undergraduate Instructor of the Year, College of Business
1997	Undergraduate Instructor of the Year, College of Business

Other Employment

1992 – 1995	Senior Tax Specialist, KPMG Peat Marwick, Buffalo, New York
1988 – 1989	Staff Accountant, Deloitte, Haskins & Sells, Buffalo, New York

Other Professional Activities

2012 – 2014	Program Coordinator, Louis A. Grief Tax Institute, University of Louisville
2000 – 2001	Program Coordinator, Louis A. Grief Tax Institute, University of Louisville

Professional Presentations

2000 Annual Louis A. Grief Tax Institute

- Estate and Gift Taxation: Wills, Probate, and Intestacy

1998 Annual Louis A. Grief Tax Institute

- Highlights of the Internal Revenue Service Restructuring and Reform Act of 1998
- Burden of Proof Rules: An Analysis
- The New Accountant-Client Privilege

1997 Annual Louis A. Grief Tax Institute

- Highlights of the Taxpayer Relief Act of 1997
- Federal Income Tax and Bankruptcy
- Estate Planning Update: An Analysis of the New Family-Owned Business Estate Tax Exclusion

1996 Annual Louis A. Grief Tax Institute

- Postmortem Tax Planning and Practice
- Divorce and Remarriage: Tax Consequences
- Money Structuring and Civil Forfeiture

1995 Annual Louis A. Grief Tax Institute

- What are the Implications of a Flat Tax? An Analysis of Different Plans
- Federal Estate and Gift Taxation: Estate Freeze Techniques
- Limited Liability Companies: Attributes, Advantages, and Uncertainties
- Tax Credits: 1995 Update