



## Joseph A. Peterson

SENIOR ATTORNEY

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### Practice Areas

Alternative Dispute Resolution

Business Law

Business Tax Controversy

Business Tax Planning

Employee Retention Credit Compliance

Liquor Licensing

Personal Tax Controversy

State & Local Tax

Tax Law

### Education

- Wayne State University Law School, J.D., 2015
- Raymond L. Krell Scholarship, Wayne State University Law School, 2012-2013, 2013-2014
- Silver Key Recipient, Wayne State University Law School, 2014
- Wayne Law Review, Senior Articles Editor
- Wayne State University Law School Moot Court, senior member, Tulane

Joseph A. Peterson is a member of Plunkett Cooney's Business Transactions & Planning Practice Group and serves as leader of the firm's Tax Law Practice Group. He has extensive experience with tax law, risk management and litigation.

Mr. Peterson's tax controversy and resolution practice includes audit defense, collections and litigation involving the Internal Revenue Service (IRS) and/or state entities, particularly in Michigan. His expertise includes negotiating to resolve outstanding tax issues by utilizing penalty abatements, lien removal, discharge or subordination, installment agreements and offers in compromise to settle tax balances and provide individuals and businesses with a fresh start with the IRS or state. He also has experience seeking innocent spouse relief for clients. Mr. Peterson also reviews the transcripts for individual and business clients, particularly high-net-worth clients, to prevent additional tax assessments and address future audits.

In addition, Mr. Peterson has extensive experience regarding the Employee Retention Credit Program (ERC). He designs and implements models used to complete ERC calculations in conjunction with full Paycheck Protection Program Forgiveness. The process also involves drafting 941X returns for submission to the IRS. He consults with clients to safeguard against any future ERC audit conducted by the IRS relating to the ERC program.

### Representative Client Work

- Successfully argued in U.S. Tax Court that increase to the gross income should instead be categorized as attendant care wages and exempted from gross income for disabled taxpayers in Genesee

JOSEPH A. PETERSON Cont.

Sports Law Outside  
Competition Coach

- Wayne State  
University Law School  
Student Trial  
Advocacy Program,  
Trial Coordinator,  
semi-final team,  
Winter 2014
- Metropolitan State  
University of Denver,  
B.S., 2012

### Admissions

Michigan, 2015

U.S. Tax Court, 2016

U.S. District Court, Eastern  
District of Michigan, 2016

### County

- Successfully argued in U.S. Tax Court to exclude gross income improperly attributed due to identity theft for a retired Detroit Tigers baseball player
- Successfully resolved a \$1.5 million tax balance for a business in Van Buren County through the coordination of the sale of properties and a multi-tiered settlement that included an installment agreement and a six-figure first time penalty abatement
- Negotiated the release of an IRS wage levy for a Michigan urologist and coordinated an installment agreement to resolve his remaining tax balance with the IRS
- Secured a \$1.4 million Employee Retention Credit for a regional restaurant group with 23 locations
- Appeared before the Michigan Department of Treasury on behalf of an out-of-state oil and gas company to argue the applicability of depreciation as defined in the tax code to the severance of oil and gas assets located in Michigan

### Professional Affiliations

- Michigan Association of Certified Public Accountants (Ethics Committee)
- State Bar of Michigan (Taxation Section Council Member & Public Communications Officer, 2024 - Present)
- Oakland County Bar Association (Tax Committee, Vice President Elect, 2024)

### Publications & Lectures

- "Reversal of *Chevron* and Effects on the IRS," Presenter, State Bar of Michigan Annual Tax Conference - State and Local Tax Committee breakout session, May 22, 2025
- "Understanding Residential & Commercial Property Tax Appeals," Presenter, Macomb Insiders - Investors Club Meet Up, Mt. Clemens, MI, Jan. 21, 2025
- "Helping Small Businesses Survive & Thrive (Tax Law Essentials)," Presenter, Mexican Consulate (Detroit) Webinar for Entrepreneurs

JOSEPH A. PETERSON Cont.

and Small Business Owners, Aug. 28, 2024

- "How the Reversal of Chevron Will Impact the IRS," Author, dbusiness.com, Sept. 9, 2024
- "The IRS and Tax Compliance in the Post-COVID Economy," Author, dbusiness.com, March 11, 2024
- "Accounting Malpractice: The Ship is Sinking," Presenter, Michigan Association of CPAs East Metro Small Practitioners Monthly Meeting Group, Grosse Pointe, Feb. 28, 2024