

Jerry Chang

PARTNER



Jerry Chang works closely with clients to develop cutting-edge tax plans that reduce their tax liabilities.

Jerry focuses his practice on income tax planning and compliance services for high-net-worth individuals and represents clients before the IRS and state and local tax authorities. He also provides consulting and tax research services to businesses in various industries.

Regarded as responsive, attentive, precise and creative, Jerry guides clients through even the most complicated tax matters, finding ways to minimize their tax liability while complying fully with federal, state and local tax regimes. He regularly handles a wide range of tax matters—from facilitating the sale of a private business to meeting with the IRS to discuss and ultimately secured reversal of a tax penalty.

Jerry also is the firm's "go-to" CPA when difficult issues arise due to complex and ever-changing tax regulations and rules. He closely monitors new and proposed tax changes, serves as the firm's tax adviser on complex examinations and notices, and provides invaluable experience representing clients before key regulatory bodies—from the IRS to numerous state and local tax authorities. Jerry's ongoing research on taxation and tax-related financial issues is especially beneficial when addressing issues related to complicated tax returns.

Before joining Lutz and Carr, Jerry was a senior tax accountant/adviser at a law firm focused solely on tax matters—from federal and state tax compliance disputes to complications related to business structure and tax planning. He is the editor of "Tax Spotlights," Lutz and Carr's monthly newsletter.

Professional Affiliations

- American Institute of Certified Public Accountants (AICPA)

Publications & Presentations

- Editor, "Tax Spotlights" (Lutz and Carr newsletter)

Representative Experience

- Represented a Brooklyn, N.Y.-based integrator of solar electric systems with clients throughout the Northeast, in its \$15M sale of the business. Prepared all necessary financial documentation and responded to numerous queries from the buyer's attorneys and accountants.
- Obtained abatement of a \$25,000 IRS penalty for a technology company based in New York.
- Represented an innovative, international hospitality consultant in the hotel, restaurant, and food services industry, in an IRS audit. After preparing work papers for the IRS review and attending meetings with the examiner, the audit resulted in no change.

EDUCATION & CERTIFICATIONS

Certified Public Accountant (New York, 2006)

B.B.A., Baruch College (2000)

SERVICES

TAX
