



## 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

Intellectual Property

Liquor Licensing

Nonprofit Law

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

Joseph A. Peterson leads Plunkett Cooney's Tax Law Practice Group and is a member of the firm's Business Transactions & Planning Practice Group, where he counsels businesses, individuals and nonprofit organizations on a range of federal and state tax matters and assists them with management of their intellectual property.

Trusted for his strategic approach and practical insight, Mr. Peterson helps his clients resolve disputes, minimize risk and plan effectively for long-term financial stability.

Mr. Peterson focuses his practice on tax controversy and resolution, representing clients before the Internal Revenue Service (IRS) and state taxing authorities in audits, collections and litigation. He develops tailored strategies to resolve complex tax issues through penalty abatements, lien releases, installment agreements and offers in compromise – helping his clients restore compliance and achieve positive financial outcomes. He also provides counsel and advice on innocent spouse relief, and he conducts proactive IRS transcript reviews to identify potential exposure and prevent future disputes.

In addition to his controversy work, Mr. Peterson provides comprehensive tax planning and advisory services for corporations, executives, entrepreneurs and nonprofit organizations. His experience includes mergers and acquisitions, executive and deferred compensation, estate and charitable planning, business structuring and ongoing compliance. He also guides nonprofit clients through every stage of their life cycle– from obtaining and maintaining 501(c)(3) tax-exempt status to addressing private benefit, private inurement and unrelated business income concerns.

JOSEPH A. PETERSON Cont.

- Wayne State University Law School Moot Court, senior member, Tulane 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

Mr. Peterson offers specialized tax consulting on the classification and taxability of settlement claims, with a particular focus on employment-related settlements involving wage, discrimination and emotional distress claims. He works closely with counsel and employers to structure settlements that comply with IRS rules, reduce exposure and achieve favorable tax results.

Known for his measured demeanor and solution-oriented approach, Mr. Peterson delivers sophisticated tax advice with clarity and confidence – helping his clients make informed decisions that gives them peace of mind and protects what matters most.

### 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 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)

JOSEPH A. PETERSON Cont.

- State Bar of Michigan (Taxation Section Council Member & Public Communications Officer, 2024 - Present; District I Character and Fitness Committee, member 2026 - 2028)
- 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 and Small Business Owners, Aug. 28, 2024
- "How the Reversal of Chevron Will Impact the IRS," Author, [dbusiness.com](https://dbusiness.com), Sept. 9, 2024
- "The IRS and Tax Compliance in the Post-COVID Economy," Author, [dbusiness.com](https://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

### **Honors & Recognitions**

- *Best Lawyers: Ones to Watch in America*<sup>™</sup> – Tax Litigation and Controversy and Tax Law, 2026