

**STEVEN J. WILLIS**  
**PROFESSOR OF LAW**

University of Florida  
Levin College of Law  
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**PROFESSIONAL AFFILIATIONS**

Florida Bar Association, Bar No. 0712980  
Louisiana Bar Association, Bar. No. 13543 (inactive)  
American Bar Association  
Louisiana Society of Certified Public Accountants, Cert. No. 14248 (inactive)  
Admitted: U.S. Dist. Ct. Western Dist. Of Louisiana  
Middle Dist. Of Florida

**PERSONAL INFORMATION**

Married to Vickey Broussard Willis, Teacher at Oak Hall Private School.  
Children: Timothy Scott Willis (14) and Ann E. Willis (11).  
Assistant Scout Master and Advancement Chair, Boy Scout Troop 611.  
Past Cub Master, Cub Scout Pack 611.  
Member, Trinity United Methodist Church and attendee Grace United  
Methodist Church.

**WORK EXPERIENCE**

1985 - current      Professor of Law  
University of Florida Levin College of Law  
and  
Professor of Law, Graduate Record Faculty  
University of Florida Graduate School  
Courses taught:  
Income Tax (J.D.)  
Tax I (J.D. and LL.M.)  
Tax II (J.D. and LL.M.)  
Tax III (Taxation of Timing) (LL.M.)  
Tax Exempt Organizations (LL.M.)  
Tax Policy (LL.M.)  
Tax Procedure (LL.M.)  
Tax Seminar (J.D. and LL.M.)  
Family Law (J.D.)  
Economics of the Family (J.D.)

Legal Accounting (J.D.)  
 Professional Responsibility (J.D.)  
 Ph.D. Committee (Accounting) (twice)  
 Ph.D. Committee (Clinical Psychology) (twice)

1983 - 1985 Associate Professor of Law  
 University of Florida College of Law

1981 - 1983 Assistant Professor of Law  
 University of Florida College of Law

1980 - 1981 Instructor in Taxation  
 New York University College of Law

1978 - 1979 Law Clerk and Crier  
 Honorable W. Eugene Davis  
 United States District Court  
 Western District of Louisiana  
 (now of the Fifth Circuit Court of Appeals)

1977 - 1978 Associate  
 Phelps, Dunbar, Marks, Claverie & Sims  
 New Orleans, Louisiana

2003, 2005, 2006, Visiting Professor,  
 University of Warsaw  
 Warsaw, Poland

2006, Visiting Professor  
 University of Stellenbosch  
 Stellenbosch, South Africa

Fall 1992 Visiting Professor,  
 Rikjs University  
 Leiden, Netherlands

1988 - 1990 Partner  
 Willis & Associates  
 Ocala, Florida

## EDUCATION

LL.M. (Taxation), 1979, New York University College of Law.

J.D., with honors, 1977, Louisiana State University College of Law.

B.S. (Accounting), *cum laude*, 1974, Louisiana State University College of Business Administration

## HONORS and ACTIVITIES

Senator, Florida Faculty Senate, 2002-08  
 Member, Academic Policy Council 2006-07  
 Liaison to University Curriculum Committee 2006-07  
 Parliamentarian, Florida Faculty Senate, 2002  
 Chairman, Faculty Development Committee, 2006-07

Chairman, Technology Committee, UF College of Law, 2001-03  
Chairman, Cyber-Tax Committee, Tax Section, Florida Bar, 2001-04  
Board of Editors, *Florida Tax Review*, University of Florida, 1996- present  
Faculty Editor, *Florida Law Review, Tax Issue*, University of Florida, 1991  
Managing Editor, *Tax Law Review*, New York University, 1979  
Associate Editor, *Louisiana Law Review*, Louisiana State University, 1976-1977  
Order of the Coif, Louisiana Chapter (1977). Secretary-Treasurer, Florida Chapter (1988-91)  
L.S.U. Law Center Hall of Fame (elected 1987)  
Member, University of Florida Faculty Senate, 1987-88; 1994-95  
Phi Kappa Phi (honorary)  
Beta Alpha Psi (accounting honorary)  
Beta Gamma Sigma (business honorary)  
Phi Alpha Delta (law professional)  
Delta Sigma Pi (business professional)

## **PUBLICATIONS**

### **Books and Monographs**

**FINANCIAL CALCULATIONS FOR LAWYERS** (2006) (225 pages) (ufcle.com)

**THE TAX LAW OF CHARITIES** (2004) (1100 pages) (with Jones, Brennen, & Moran) (West Publishing Company) (2d Ed. 2007)

Statutory Supplement to **THE TAX LAW OF CHARITIES** (2004) (with Jones, Brennen, & Moran) (West Publishing Company) (2d Ed. 2008)

Teacher's Manual for **THE TAX LAW OF CHARITIES** (2004) (with Jones, Brennen, & Moran) (West Publishing Company) (2d Ed. 2008)

**Tax Accounting** (with Manning & Lang) (LEXIS, 2006) (2d Ed. Forthcoming in 2009)

Teacher's Manual for **Tax Accounting** (with Manning & Lang) (LEXIS, 2006) (2d Ed. Forthcoming in 2009)

### **On-Line CLE and other Courses:**

**FINANCIAL CALCULATIONS FOR LAWYERS** (2006) (7 hours of lecture with slides and original software calculators) (ufcle.com) (2d Ed. 2008)

**HOW TO FORM A PUBLIC CHARITY** (2007) (5 hours of lecture with slides) (ufcle.com)

**INTRODUCTION TO TAX SCHOOL** (2008) (ufclce.com) (Interactive collections of Top 100 Tax Cases with edits and comments, Top 40 Tax Doctrines with comments and short papers, Top 50 Tax Forms with comments, Top 100 Tax Terms with comments, Tax Ethics, Tax Humor, Internal Revenue Code Structure, the U.S. Court System as it Relates to Tax, History of the U.S. Tax System, Selected Tax Readings, Tax Authorities, Tax Research, and interactive slide presentation covering basic U.S. Income Tax Law, and much more).

**TAX EXEMPT ORGANIZATIONS** (2005 with continuous updates though 2008) (available through ufclce.com) a collection of cases (with edits and comments), statutes (with edits and comments), essays, and slides presentations to accompany **THE TAX LAW OF CHARITIES**).

### **Unpublished Course Materials:**

FLORIDA FAMILY LAW, CASES, MATERIALS, STATUTES, AND FORMS: AN INTERACTIVE AND HYPERTEXT CASEBOOK (2001) (3000+ pages) (available through ufclce.com)

INCOME TAX: CASES, MATERIALS, STATUTES, AND FORMS: AN INTERACTIVE AND HYPERTEXT CASEBOOK (2001) (3000+ pages) (available on CD) excerpts available at <http://nersp.nerdc.ufl.edu/~acadian/courses.htm>

ADVANCED INCOME TAX: CASES, MATERIALS, STATUTES, AND FORMS: AN INTERACTIVE AND HYPERTEXT CASEBOOK (2001) (3000+ pages) (available on CD or through ufclce.com)

RELATED PARTY TRANSACTIONS, (updated through 2007) a slide presentation on Tax Law, presented to various conferences and available at ufclce.com.

TAX CALCULATORS, (updated through 2008) a series of original software for various Tax Law Sections and available at ufclce.com.

### **Journals:**

*People in Glass Houses*, Vol. 113 TAX NOTES No. 5, October 30, 2006

*Family Law Economics, Child Support, and Alimony: Ruminations on Income, Part I*, 78 Fla. B. J. 34 (May 2004)

*Family Law Economics, Child Support, and Alimony: Ruminations on Income, Part II*, 78 Fla. B. J. 34 (June 2004)

*Show Me the Numbers, Please* 93 TAX NOTES 1321 (2001)

*Its Time For Schlude to Go*, 93 TAX NOTES 127 (2001)

- Offensive v. Defensive Equitable Recoupment*, 74 TAX NOTES 207 (1997)
- Erroneous Deductions and The Tax Benefit Rule*, 68 TAX NOTES 1479 (1995)
- Albertson's: A Little Less Emotion, Please*, 64 TAX NOTES 961 (1994)
- Leave Albertson's Alone*, 63 TAX NOTES 1481 (1994) 3
- The Option Aspect of Nonrecourse Loans*, 54 TAX NOTES 441 (1992)
- Correction of Errors Via Equitable Recoupment and Tax Mitigation: Some People Still Do Not Understand*, 52 TAX NOTES 1421 (1991)
- A Different View of the Tax Benefit Rule: A Unified Theory of Error Correction*, 42 FLA. L. REV. 575 (1991)
- Masks, Magic and Games: The Use of Tax Law As a Policy Tool*, 4 AM. J. TAX POL. 41 (1985)
- Some Limits of Equitable Recoupment, Tax Mitigation, and Res Judicata: Reflections Prompted by Chertkof v. United States*, 38 TAX LAWYER 625 (1985)
- I.R.C. Section 274(b) and Duberstein Resurface: The Emperor Still Has No Clothes*, 25 ARIZ. L. REV. 907 (1983) (with Hawley)
- Of [Im]Permissible Illogic and Section 1031*, 34 UNIV. FLA. L. REV. 72 (1982)
- Carry-over Basis Provisions of the Tax Reform Act of 1976: Section 1023*, 31 TAX LAWYER 191 (1977) (with Landry)
- Corporations, Fiduciaries, and Conflicts of Interest*, 37 LA. L. REV. 809 (1976)

**Other Course Outlines:**

LEGAL ACCOUNTING: A SLIDE PRESENTATION, 2000, available at <http://nersp.nerdc.ufl.edu/~acadian/courses.htm>