www.apslaw.com

Kathryn S. Windsor

Counsel, Providence, RI

Call: 401.274.7200 | Fax: 401.751.0604 | Email: kwindsor@apslaw.com

PRACTICE AREAS

Business & Corporate

Tax

Trusts & Estates

EDUCATION

Boston University School of Law (L.L.M., Taxation, 2007)

Roger Williams University School of Law (J.D., 2005)

Washington University in St. Louis (B.A., History and Anthropology, 1996)

ADMISSIONS

Rhode Island

Connecticut

U.S. District Court, District of Rhode Island

United States Tax Court

OVERVIEW

Kathryn is a member of the firm's Tax Group and represents clients in a variety of tax law matters. Her practice areas include corporate tax, partnership tax, trusts and estates, federal and state tax resolution, self-directed IRAs and tax-exempt entities. Kathryn's other practice areas include capital gains planning, tax credit and incentive programs, business succession planning, bankruptcy tax law, and various other types of tax planning and tax law. Kathryn holds an advanced degree in tax law from Boston University School of Law.

Prior to joining Adler Pollock & Sheehan, Kathryn was Senior Tax Counsel at a boutique tax law firm in Providence where she managed the firm's tax resolution practice.

Kathryn also has experience in commercial lending, film financing and general corporate matters, including corporate governance.

REPRESENTATIVE MATTERS

- Represented clients in a case of first impression before the U.S. Tax Court regarding a self-directed IRA matter.
- Assisted real estate developers in tax planning to convert ordinary income to capital gains treatment.
- Successfully represented small business owners in IRS Appeals to challenge proposed tax assessments.
- Authored IRS Private Letter Ruling requests to achieve favorable results for clients.
- Experienced in state sales and use audits and appeals.
- Successfully negotiated numerous state and federal tax resolution matters including Offers in Compromise, Innocent Spouse Relief, Certificates of Discharge of Federal Tax Liens, Penalty Abatement and Installment Agreements.

SEMINARS / PUBLICATIONS

- Co-author, Revisiting the Rhode Island Acquired Real Estate Company Conveyance Tax, Rhode Island Bar Journal, November, 2021.
- Presenter, CPE Associates, 2019.
- Presenter, New England Institute on Taxation, MAA, 2019.
- Speaker, SCORE'S 19th Annual Federal and State Tax Update, December 2015.
- Guest Lecturer, Business for Modern Media, Emerson College, School of Fine Arts, October 2010 and March 2011.
- Panelist, Financing an Independent Feature Film – A Case Study, September 2020.
- U.S. Tax Incentive Panelist, 3rd Annual Film Finance Summit, New York, March 2010.
- Speaker, Foundations of Business Planning, Emerging Women in Business, June 2007.
- Speaker, Navigating IRC 409A, July 2007.

HONORS

- Recognized as a "JD Supra Top Author" in the JD Supra 2023 Readers' Choice Awards.
- Professional Excellence in the Law, Tax, Rhode Island Monthly, 2020 – 2022.
- Managing Editor, Roger Williams University Law Review.

PROFESSIONAL AFFILIATIONS

- Member, Rhode Island Bar Association
- Member, American Bar Association (Tax Section, Business Law Section, and Real Property, Estate Law Section).

IN THE COMMUNITY

- Board of Directors, Executive Women's Golf Association –Rhode Island Chapter, Chairperson, Golf Events (2008-2009).
- Clerk, Voting District III, Richmond, RI (2004-2006).

