

**Kevin C. Jones, JD, MST, CPA**  
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## Academic Work Experience

As a teacher, lecturer, speaker, and mentor, Mr. Jones has significant experience over the last 40+ years since his graduation from law school. He is currently a Professor of Practice at Virginia Tech. He recently spent one academic year as a Visiting Instructor at James Madison University. He was also the Director of the Master's in Accounting program at George Mason University where he taught at both the graduate and undergraduate level. Prior to that, was an adjunct faculty member at James Madison University where he taught accounting courses. He has also been an adjunct faculty member at the University of Maryland where he taught courses in Taxation. He has presented tax seminars for both in-house and outside participants. These include performing as a guest-lecturer for college undergraduate and graduate programs, presenting programs for client personnel and firm "Lunch & Learn" provided to clients and guests of the firm. While at the Washington National Tax Office of PWC, Mr. Jones prepared and presented on a number of topics at the firm's national tax training programs. Generally, the programs Mr. Jones has presented have ranged in length from 1-hour to 8-hours. The specific programs and topics Mr. Jones has presented are listed below.

- Virginia Tech  
Assistant Professor of Practice Dec. 2024 – Present
- James Madison University  
Visiting Instructor Dec. 2023 – Dec. 2024
- George Mason University  
M.S. in Accounting Program Director/Term Instructor Aug. 2020 – Dec. 2022
- James Madison University  
Adjunct Professor Aug. 2017 – Dec. 2017
- University of Maryland  
Adjunct Professor Aug. 2010 – June 2012
- Temple University School of Law  
Teaching Assistant to Professor Robert J. Bartow's Taxation Course Spring 1993

## Publications

With respect to writing and publications, Mr. Jones recently completed a 5-year term as a member of the editorial advisory board of *The Tax Adviser*, the monthly magazine of tax planning, trends, and techniques published by the American Institute of Certified Public Accountants. The board is comprised of top tax professionals from the Big 4 and other accounting firms, college professors, and major law firms. In that role, Mr. Jones was responsible for reviewing feature articles that appeared in the magazine to ensure that all published articles maintain the publication's high editorial standards. Mr. Jones himself is a prolific writer, primarily in the form of tax newsletters for in-house and client audiences, writing on a variety of topics of interest to the firm and its clients. In addition, Mr. Jones has been published in the *Temple Law Review*, writing on the exclusion of damages under section 104(a)(2). He has also been published by BNA in its quarterly tax planning publication, writing on the special planning opportunities and pitfalls of converting from C-corporation to S-corporation status.

## Non-Academic Work Experience

Taxation is Mr. Jones' primary area of expertise. He has over 35 years of experience counseling clients on the tax aspects of business transactions. He has extensive experience negotiating and litigating tax controversies at the federal and state levels. Mr. Jones has performed research and tax planning, and implemented tax minimization strategies for corporations, partnerships, limited liability companies, trusts and tax-exempt organizations. He has also provided tax return preparation services to individuals and businesses.

Mr. Jones frequently assists clients with the international tax aspects of their businesses, including both inbound and outbound transactions and structures, as well as the taxation of U.S. expatriates of multi-national corporations. He has experience with various industries, including manufacturing, distribution, mass media, construction, real estate, government contracting, hospitality, professional services and technology. He was for many years the tax advisor to the Washington Redskins (now Commanders).

Previously, Mr. Jones worked in both law and accounting firms and was a law clerk to The Honorable Laurence J. Whalen at the United States Tax Court. He also worked for the national tax office of a Big 4 accounting firm where, as a member of the firm's "Think Tank", he developed new and cutting edge tax strategies for implementation on behalf of firm clients nationwide. He was most recently a Tax Partner with Citrin Cooperman, a top 20 public accounting firm after 7 years as a Tax Partner with BDO USA, LLP, the 5<sup>th</sup> largest international accounting firm.

- Citrin Cooperman & Company, LLP  
DC Metro Office Managing Partner  
Tax Partner  
Jan. 2023- Dec. 2023  
Jan. 2019 – Aug. 2020
- BDO USA, LLP  
Tax Partner  
Nov. 2011 – Dec. 2018
- Watkins Meegan LLC  
Director, Tax Group  
2006 – 2011

- PWC  
Director – Washington National Tax Office - Tax Knowledge Management 2004 -- 2006
- Buchanan Ingersoll Professional Corporation  
Associate Attorney (Tax) 1997 – 2003
- White & Case  
Associate Attorney (Tax) 1994 – 1997
- Dechert, Price & Rhoads  
Associate Attorney (Tax) 1993 – 1994
- United States Tax Court  
Law Clerk to the Honorable Laurence J. Whalen, Judge Summer 1991 and 1992

## Education

Juris Doctor (*Cum Laude*), Temple University 1993

Master of Science, Taxation, Georgetown University 1988

Bachelor of Business Administration, Accounting, James Madison University 1981

## Certifications and Licenses

United States Tax Court

District of Columbia Bar

Maryland State Bar

Pennsylvania State Bar (inactive status)

Certified Public Accountant – Virginia 1983

## Memberships

American Bar Association

D.C. Bar Association

American Institute of Certified Public Accountants

Virginia Society of Certified Public Accountants

## Courses Taught and Presentations Made

- Accounting for Non-Business Majors (ACTG 244 JMU)
- Accounting for Decision Making (ACCT 303 GMU)
- Principles of Accounting (ACTG 241 JMU)
- Principles of Taxation (Univ of MD)
- Global Accounting Environment (ACCT 795 GMU)
- 2020 CARES Act
- Annual Tax Update
- 2010 Healthcare Act

- 2017 Tax Cuts and Jobs Act
- Section 382 Limits on Net Operating Losses
- Taxation Essentials of LLCs, LLPs, LPs and Other Partnerships
- Basics of S-Corporation Taxation
- Partnership Taxation: Beyond the Basics
- Choice of Entity
- Circular 230 and the AICPA Statements on Standards of Tax Services
- Professional Ethics in Taxation
- Section 1031 Like-Kind Exchanges
- Section 199 Domestic Production Activities Deduction
- Section 199A Deduction for Qualified Business Income
- Section 469 Passive Activity Losses
- Qualified and Non-Qualified Deferred Compensation and Section 409A
- Introduction to Section 409A
- FIN 48 – Uncertainty in Income Taxes
- Basics of Tax-Exempt Entities
- Tax-Exemption Issues in the Healthcare Industry
- Why Choose a Career in Taxation
- Why Choose a Career in Accounting

## **Professional Non-Academic Experience**

- Structuring tax-free reorganizations, spin-offs, taxable asset and stock purchases, and tax planning and tax minimization strategies for business clients in a variety of industries
- Planning and implementation of tax and corporate aspects of establishing new business operations, including choice of entity issues
- Structuring of S corporations, including operational aspects, conversions from C status, Qualified Subchapter S Subsidiaries, stockholders' agreements, and distribution aspects
- Counseling clients on public offerings of debt and equity securities, including structured financial products
- Advising clients on tax accounting matters, including capitalization and amortization of intangibles, depreciation inventory capitalization, and changes in methods of accounting; and on complex tax planning transactions, including the use of liquidations, stock redemptions, and convertible notes
- Obtaining private letter rulings from the IRS National Office regarding desired tax treatment of specific transactions
- Representing clients at the audit or appeals levels within the IRS or in the United States Tax Court, and at the state and local levels
- Drafting Protest Letters, Tax Court Petitions, Motions, and Stipulations, and negotiating and responding to discovery requests
- Advising clients regarding the particular federal and state tax requirements associated with attaining and maintaining tax-exempt status and advising private foundation clients on their organizational and operational activity
- Advising clients on issues and transactions related to personal holding companies, passive activity losses, subchapter M-regulated investment companies, payroll taxes, and backup withholding

- Advising clients regarding the international tax aspects of transactions involving both treaty and non-treaty countries, controlled foreign corporation (CFC) status, Subpart F, transfer pricing, tax equalization policies for expatriate workers, and the structuring of transactions and operations for minimization of worldwide effective tax rate
- Preparation of individual and business income tax returns
- Advising clients regarding state and local income, and sales and use taxation

## **Awards and Honors**

Member of Editorial Advisory Board - *The Tax Advisor*, AICPA monthly magazine of planning, trends, and techniques 2010-2015

Temple University School of Law

- Member of *Temple Law Review*
- Joseph W. Price, III Award as Outstanding Student in Tax Law
- American Jurisprudence Award – Legal Writing
- Best Paper – Corporate Tax
- Best Paper – Partnership Tax