



Julie Treppa

Partner

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Julie Treppa is a versatile, highly experienced practitioner with expertise in a broad range of tax-related issues and controversies involving federal, state and other taxing authorities.

She began her tax career as an IRS auditor in the exam division. Following law school, she has advised clients on an exceptionally broad range of tax-related subjects, including transaction planning, fund formation, equity incentive programs, and deferred compensation matters under Code Section 409A.

Julie is particularly experienced in developing strategies to help investors, developers, businesses, and non-profit organizations use tax incentives and tax credits to achieve financial goals while supporting social, environmental, and other community-based priorities. Two areas in which she has special expertise are New Markets Tax Credits and Opportunity Zones, both of which are designed to induce investments in specified low-income communities. In her practice, Julie has utilized these vehicles for clients on a broad range of projects, ranging from the development of local commercial office buildings and healthcare facilities to a fish processing plant in Alaska and the conservation of a salmon sanctuary in Northern California.

As a practitioner, Julie emphasizes developing a deep understanding of a client's business, and arriving at tax plans that supports their specific business objectives. Her goal is to develop practical, real-world tax minimization strategies that are both innovative and effective.

Distinctions

- *Best Lawyers in America*, Nonprofit/Charity Law and Tax Law (2018-2024)
- *Chambers USA*: Cannabis Law - Corporate/Transactional (2020); Cannabis Law - Western United States, Band 2 (2021-2023)

Memberships and Affiliations

- Fellow, American College of Tax Counsel (ACTC)
- San Francisco Area Women Tax Lawyers
- Volunteer Income Tax Assistance Program

Experience

Mission Clean Energy

Advised utility scale renewable energy developer Mission Clean Energy, LLC in connection with private equity firm Wafra Inc.'s acquisition of a controlling interest in Mission Clean Energy.

Next Green Wave Holdings Agreement to Sell to Planet 13 Holdings

Represented California seed-to-shelf cannabis producer Next Green Wave Holdings (NGW) as U.S. counsel

Services

- Tax
- Tax Credits
- Business Transactions
- Mergers & Acquisitions
- Private Client
- Private Equity and Venture Capital
- Real Estate

Education

- University of San Francisco School of Law (J.D., 1995)
 - *magna cum laude*
- Golden Gate University School of Tax (M.S., 1992)
 - Taxation
- University of California, Davis (B.A., 1987)

Bar Admissions

- California

in its definitive arrangement agreement to be sold to Nevada-based cannabis company Planet 13 Holdings Inc.

ACE Cider Sale to Vintage Wine Estate

Represented ACE Cider, The California Cider Company, the top independently owned hard cider brand in the U.S., in its sale to Vintage Wine Estates, Inc.

Publications

April 3, 2023

How Nonprofits Can Use New Markets Tax Credits To Achieve Financial Goals

EO Radio Show – Your Nonprofit Legal Resource

January 23, 2023

Federal and California Taxpayer Relief: Reprieve From Wet Winter Weather

July 6, 2022

Getting With The Program: How Opportunity Zone Investors Can Navigate Tax Benefits

Bisnow

February 25, 2021

New Round of PPP Loans: What Nonprofits Need to Know

Nonprofit Education Series

September 16, 2020

Real Perspectives Podcast With Julie Treppa on Opportunity Zones

The Registry

August 31, 2020

Guidance on Directive to Defer Payroll Tax Obligations Leaves Unanswered Questions

July 24, 2020

Treasury Grants Relief to Opportunity Zone Investors in Light of Coronavirus Pandemic

Accounting Today

July 13, 2020

COVID Relief Granted to Opportunity Zone Investors

Financial Investor

March 26, 2020

Tax Relief in Response to the COVID-19 Outbreak

May 22, 2019

Legal Ins and Outs of 'Opportunity Zones' — So Far

North Bay Business Journal

March/April 2019

Navigating the Opportunity Zone Program

California Constructor

12/20/2018

Opportunity Zone Program Drives Investments to Low-Income Communities

10/29/2018

Treasury Department Guidance Will Stimulate Opportunity Fund Investments

3/8/2018

California's Proposed Opportunity Zones Announced

Outside the Office

The best way to describe Julie when she's not practicing law is "always in motion." She's an avid runner, having competed in one marathon, numerous half-marathons and many shorter races, as well as the occasional triathlon. By the way, she often runs these with her daughter, who's half her age. At a somewhat slower pace, she also enjoys hiking and traveling, with a recent family destination being Argentina.