

Press Release

Akerman Strengthens National Tax Practice with Arrival of Tax Controversy Litigator Stephen Josey

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Private client tax controversy lawyer brings significant IRS and DOJ experience representing high-net-worth individuals, executives, family offices, fiduciaries, and businesses

Akerman announced today that Stephen Josey has joined the firm's Tax Practice Group as a partner in New York. A *Chambers*-ranked private client tax controversy lawyer, Stephen brings extensive experience representing high-net-worth individuals, executives, family offices, fiduciaries, and businesses in sensitive and consequential tax disputes involving the Internal Revenue Service (IRS) and the U.S. Department of Justice (DOJ).

Stephen focuses on federal tax controversy and litigation, including IRS examinations, administrative appeals, government investigations, and complex tax disputes. His matters often involve substantial financial exposure, reputational sensitivity, or allegations of fraud. He also advises clients on tax return positions and audit readiness following liquidity events and other wealth-generating transactions.

“Stephen brings a rare combination of sophisticated tax controversy experience, strong litigation skills, and firsthand insight into how the government

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Stephen A. Josey
Carolyn Pokorny
Adam von Poblitz

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evaluates and builds tax cases,” said David Blum, chair of the Tax Practice Group. “His experience will be particularly valuable to clients navigating high-stakes tax disputes, investigations, and issues arising from significant wealth events. He also adds another important dimension to our growing capabilities across tax, private wealth, and government investigations.”

Before entering private practice, Stephen served as a Trial Attorney in the U.S. Department of Justice Tax Division, which he joined through the Attorney General’s Honors Program. During his tenure, he handled affirmative and defensive civil tax litigation and received the DOJ Tax Division’s Outstanding Attorney Award. He later served as a Trial Attorney in the DOJ Civil Division’s Commercial Litigation Branch, where he handled complex federal litigation, including matters before the U.S. Court of International Trade and appeals to the U.S. Court of Appeals for the Federal Circuit.

That government experience informs Stephen’s approach to representing taxpayers. He draws on his understanding of how the government develops and evaluates cases to assess factual and legal positions, identify potential vulnerabilities, and determine where government procedures may affect the outcome. His litigation experience spans the U.S. Tax Court, federal district courts, the U.S. Court of Federal Claims, and federal courts of appeals.

In addition to tax controversy and litigation, Stephen advises executives, founders, and investors on tax positions following liquidity events and other transactions that create significant tax considerations. His experience includes advising on qualified small business stock, contingent earnouts, and qualified opportunity zones, as well as foreign information return penalties and voluntary disclosures involving prior tax noncompliance.

Stephen’s move to Akerman further expands the firm’s national capabilities serving high-net-worth

individuals, families, and family offices. He joins after the recent arrival of Adam von Poblitz, chair of Akerman's Family Office Practice, who advises ultra-high-net-worth individuals, families, and family offices on sophisticated domestic and international wealth planning, tax, trusts, governance, succession and wealth preservation matters. Stephen's practice also overlaps with former Acting U.S. Attorney Carolyn Pokorny, who recently joined as co-chair of Akerman's White Collar Crime and Government Investigations Practice, representing companies, executives, and boards in high-stakes government investigations, enforcement proceedings, and related litigation.

Stephen is an active member of the American Bar Association Tax Section and has served in leadership roles within the Section and the New York City Bar Association. His work has been published in *Bloomberg Tax*, *Tax Notes*, *Law360 Tax Authority*, *TAXES*, *The CPA Journal*, and the *Journal of Tax Practice and Procedure*, among other publications. He has also spoken at programs hosted by the NYU Tax Controversy Forum, ABA Tax Section, Practising Law Institute, Tax Executives Institute, and other professional organizations.

About Akerman

Founded in 1920, Akerman is an Am Law 100 firm recognized by Vault among the nation's most prestigious law firms. The firm has more than 700 lawyers and business professionals throughout the United States.