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Rebecca Wohltman

COUNSEL IN O'FALLON, IL

SERVICES

Business Strategies & Advice

General Business Law

Corporate Formation, Governance
& Advice

Corporate Transactions

Mergers & Acquisitions

Tax Advice & Controversies

INDUSTRIES

Accounting

Entrepreneurs, Closely Held &
Family Owned Business

Counsel Rebecca (Becky) Wohltman joined Sandberg Phoenix in 2024. Rebecca is a member of our Business Practice group. She is an experienced taxation and business law attorney focusing her practice on federal and state tax controversy (audits, Tax Court Litigation, collections), criminal tax, tax planning, business transactions, business planning, contracts, estate planning, and real estate matters.

In her previous position, Becky defended criminal tax cases before the Department of Justice- Tax Division and resolved tax matters of all kinds for her clients. She has vast experience in handling and assisting all components of stock asset, and real estate transactions totaling in excess of \$325 million and spent a considerable amount of time drafting and reviewing contracts, operating agreements, by-laws, and shareholder agreements as well as negotiating settlement of tax, contracts, and business disputes.

During her time as the Assistant Attorney General to the Missouri Attorney General, she researched and crafted new arguments for defending attorney's fees requests in judicial review of administrative decisions, which were upheld by the Missouri Supreme Court in *Garland v. Ruhl* and Family Support Division. She argued *Cooling v. State of Missouri* in the Missouri Court of Appeals and wrote two additional appellate briefs. Becky also served as the Research and Editorial Assistant for the St. Louis Business Journal from 2007-2012 and was a Law Clerk for the Office of the Illinois Attorney General.

When not in the office, Becky enjoys running, baking, cooking, and spending time with her husband and kids. She is thankful for the opportunity to give back to her alma mater by serving on the McKendree University Board of Trustees.

EDUCATION

L.L.M in Taxation, Washington University School of Law

-Received Gary J Boren Memorial Award (highest GPA in graduating class) and CALI Excellence for the Future awards (highest grade in the class) for Corporate Taxation, Tax Fraud Prosecutions, Closely Held Business & Succession Planning, and Practical Skills Training in Estate and Wealth Planning.

J.D., Business Transactions Concentration, Saint Louis University School of Law

-Summa Cum Laude, Received academic awards for the highest grades in Criminal Law and Banking Regulations

BBA in Accounting & BA in Political Science, McKendree University

-Summa Cum Laude, Honors Program

-Recipient of Lincoln Laureate

LICENSURE(S) AND ADMISSION(S)

Illinois

Missouri

United States Tax Court

United States District Court, Eastern District of Missouri

CIVIC ACTIVITIES

McKendree University Board of Trustees- Chair of Student Affairs Committee, Member of Executive Committee and Committee on Enrollment Management

William McKendree Society. McKendree University

O'Fallon- Shiloh Leadership Institute (2019)

Zion Lutheran School Belleville, IL School Board Vice Chair and Chair (2015-2017)

PROFESSIONAL AFFILIATIONS

American Bar Association, Section of Taxation and Young Lawyers Division

Illinois State Bar Association

PRESENTATIONS

Corporate Transparency Act & ERC – 2024 Mathis, Marifian & Richter, Ltd. Business & Employment Seminar

Corporate Transparency Act – Belleville Chamber of Commerce (2024)

Sales Tax and Employment Tax Issues – 2022 Mathis, Marifian & Richter, Ltd. Tax Update & Planning Seminar

Employer Shared Responsibility Payment – 2021 Mathis, Marifian & Richter, Ltd. Tax Update & Planning Seminar

Employee Retention & Sick and Family Leave Tax Credits – 2021 Belleville Chamber of Commerce Webinar

Consolidated Appropriations Act 2021: Employee Retention & Sick and Family Leave Tax Credits – 2021 Leadership Council of Southern Illinois Expert Wednesday Webinar

Tax Practice and Procedure – 2020 Mathis, Marifian & Richter, Ltd. Tax Update & Planning Seminar

Sales Tax – 2019 Mathis, Marifian & Richter, Ltd. Tax Update & Planning Seminar

State Tax Cases – 2019 Mathis, Marifian & Richter, Ltd. Tax Controversy Seminar

Income Tax Updates and *Wayfair* – 2018 Mathis, Marifian & Richter, Ltd. Tax Update & Planning Seminar

Tax Reform for Individuals – 2018 Mathis, Marifian & Richter, Ltd. Tax Cuts & Jobs Act Seminar

Cancellation of Debt Income – 2016 Mathis, Marifian & Richter, Ltd. Tax Update & Planning Seminar

Tax Implications for Same Sex Marriages – 2015 Mathis, Marifian & Richter, Ltd. Tax Update & Planning Seminar

RECOGNITION

2018, 2019, 2020, 2021, 2022, 2023, 2024

Emerging Lawyer

2018

Get to Know M. E.- People to Watch

2015

MCKENDREE UNIVERSITY

Rising Star Award

2014

ATTORNEY GENERAL'S OFFICE

"Best Brief"

Award for the Appellant/Cross Respondent's brief in *Cooling v. State of Missouri*, Family Support Division, an appellate review of a request for attorney's fees.