



## **Maggie L. Simonson, JD, CPA** **The Adviser**

Goosmann Law Firm  
[SimosonM@GoosmannLaw.com](mailto:SimosonM@GoosmannLaw.com)  
Direct: (402) 884-2534  
Office: (712) 338-9106  
Cell: (515) 802-2929

1704 Hill Ave  
Spirit Lake, IA 51360  
[www.GoosmannLaw.com](http://www.GoosmannLaw.com)

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Maggie L. Simonson is a proactive and strategic tax, business law and estate planning attorney who provides concise and straight forward tax planning to help her clients achieve the most tax advantageous consequences in complex transactions and help clients navigate through the process of audits and tax controversies.

As a dually licensed attorney and CPA, Maggie's practice lies at the intersection of business law and taxation, including the crucial aspect of estate planning to minimize estate tax. Her goal is always to build a relationship with you as your trusted advisor, not just your attorney, to truly understand your goals and help you accomplish them.

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### **Education:**

The University of Iowa College of Law School, Juris Doctor, 2014

The University of Iowa Henry B. Tippie College of Business, Completed courses in the Master of Accountancy program to meet CPA requirements, 2013

William & Mary Law School, Summer in Spain Study Abroad Program, 2012

The University of Hawai'i at Mānoa, Bachelor of Business Administration in Accounting with distinction, Certificate in Spanish, 2010

### **Bar Admissions:**

- State Courts: Iowa

### **Prior Employment:**

BrownWinick Law Firm, Des Moines, IA

**Attorney 2018-2021**

- Advise clients regarding the tax implications of complex transactions and employee benefits (ERISA) law. Analyze sales tax liability. Represent clients in tax controversies. Prepare federal and state income tax returns. Form business entities.

K.L. Smith, P.C., West Des Moines, IA

#### **Attorney 2017-2018**

- Prepare tax returns for individuals, businesses, trusts, and employee benefit plans. Analyze tax implications of business entity selection and like-kind exchanges. Draft buy-sell agreements

Duncan, Green, Brown & Langeness, Des Moines, IA

#### **Attorney 2016-2017**

- Draft legal documents relating to business formation, employment agreements, mergers, purchase agreements, and estate planning. Research various tax issues. Counsel businesses to comply with corporate formalities.

CliftonLarsonAllen, LLP, West Des Moines, IA

#### **Senior Tax Associate 2014-2016**

- Prepare federal and multi-state tax returns for individuals, businesses, trusts, and non-profit organizations. Prepare compilations, financial statements, FBARs, and FR Y-9s. Determine the tax implications of transactions.

PricewaterhouseCoopers (PwC), Des Moines, IA

#### **Risk Assurance Associate 2014**

- Audit clients' systems, procedures, and policies to determine whether risk is at an acceptably low level.

#### **Professional Organizations:**

- Member of the Iowa State Bar Association
- Member of the Iowa Society of CPAs
- Member of the American Academy of Attorney-CPAs

#### **Achievement and Awards:**

- Selected for inclusion in the Best Lawyers® - 2021 Ones to Watch – Employee Benefits (ERISA) Law