

Curriculum Vitae

Robert George Popovich

Southwestern Law School
Professor of Law
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Pepperdine Caruso School of Law
Professor of Law (Emeritus)
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TEACHING EXPERIENCE – FULL PROFESSORSHIPS

Fall 2020 – Present

- **SOUTHWESTERN LAW SCHOOL – LOS ANGELES**

Professor of Law; Community Property, Contracts I & II, Wills & Trusts, Survey of Federal Income Tax

August 1, 1990 - 2017

- **PEPPERDINE UNIVERSITY SCHOOL OF LAW (NOW PEPPERDINE CARUSO SCHOOL OF LAW)**

Professor of Law; Federal Income Taxation, Federal Estate and Gift Taxation, Community Property, Estate Planning Seminar, Wills and Trusts, Contracts I and II (later combined one-semester, five-unit course), and Accounting for Lawyers. Other Subjects: Tax Practice Procedure and Research and Tax Practicum Clinic (California State Board of Equalization/Franchise Tax Board).

Sabbatical 2017/18 and 2018/19 academic years (see below; **Southwestern Law School Visits**).

Other School Teaching and Other Related: See **SIGNIFICANT LAW SCHOOL SERVICE**, below.

VISITING PROFESSORSHIPS

Fall 2017 – Spring 2020

- **SOUTHWESTERN LAW SCHOOL – LOS ANGELES**

Visiting Professor of Law; Contracts I & II, Community Property, and Survey of Federal Income Tax

Fall 2011

- **SOUTHWESTERN LAW SCHOOL – LOS ANGELES**

Visiting Professor of Law; Community Property and Survey of Federal Income Tax.

Fall 2009 – Spring 2010 (full 2009/2010 academic year)

- **SOUTHWESTERN LAW SCHOOL – LOS ANGELES**

Visiting Professor of Law; Contracts I & II, and Community Property.

Fall 2008 (full semester)

- **PEPPERDINE UNIVERSITY SCHOOL OF LAW LONDON PROGRAM**

Professor-in-Residence in London; Federal Income Taxation and Community Property

Summer 2000

- **PEPPERDINE UNIVERSITY SCHOOL OF LAW LONDON PROGRAM**

Professor-in-Residence in London; Federal Income Taxation

ADJUNCT TEACHING EXPERIENCE

1983 - 1986

- **UNIVERSITY OF LA VERNE**
- Adjunct Professor (Graduate MBA Program)

Subjects Taught: Federal Income Tax – Individual, Federal Income Tax – Partnership, Federal Income Tax – Corporation, Financial Management, and Cost Accounting.

TEACHING AWARDS

2021-2022 Academic Year

- **TEACHER OF THE YEAR AWARD (UPPER DIVISION) – SOUTHWESTERN LAW SCHOOL**

2019-2020 Academic Year

- **TEACHER OF THE YEAR AWARD (UPPER DIVISION) – SOUTHWESTERN LAW SCHOOL**

2015-2016 Academic Year

- **TEACHER OF THE YEAR AWARD – PEPPERDINE UNIVERSITY SCHOOL OF LAW STUDENT BAR ASSOCIATION**
(Eligible to receive this award was once every three years)

2012-2013 Academic Year

- **TEACHER OF THE YEAR AWARD – PEPPERDINE UNIVERSITY SCHOOL OF LAW STUDENT BAR ASSOCIATION**
(Eligible to receive this award once every three years)

2008-2009 Academic Year

- **TEACHER OF THE YEAR AWARD – PEPPERDINE UNIVERSITY SCHOOL OF LAW STUDENT BAR ASSOCIATION**
(Eligible to receive this award once every three years)

Fall 2006

- **HOWARD A. WHITE AWARD FOR TEACHING EXCELLENCE (2006–2011) – PEPPERDINE UNIVERSITY**
University-wide award for teaching excellence

2005-2006 Academic Year

- **TEACHER OF THE YEAR AWARD – PEPPERDINE UNIVERSITY SCHOOL OF LAW STUDENT BAR ASSOCIATION**
(Eligible to receive this award once every three years)

1997-1998 Academic Year

- **HARRIET AND CHARLES LUCKMAN DISTINGUISHED TEACHING FELLOW (1997–2002) – PEPPERDINE UNIVERSITY**
(Eligible to receive this award once every five years; award discontinued in 2000).

1992-1993 Academic Year

- **HARRIET AND CHARLES LUCKMAN DISTINGUISHED TEACHING FELLOW (1992–1997) – PEPPERDINE UNIVERSITY**
(Eligible to receive this award once every five years)

EDUCATION

1983-1986

- **PEPPERDINE UNIVERSITY SCHOOL OF LAW (NOW PEPPERDINE CARUSO SCHOOL OF LAW)**

Malibu, California

J.D. May 1989, *summa cum laude*

Class Rank: Number 1 out of 184

Honors/Activities:

Law Review Business Editor, 1988/89.

Law Review, Member 1987-89.

American Jurisprudence Awards and Highest Class Score (Eleven Classes).

Twice Recipient of Ronald M. Sorensen Memorial Award for Excellence in Legal Writing (1987/88 and 1988/89).

Recipient of First American Title Company Award for Excellence in the Study of Real Estate Finance

Dean's List (all semesters).

Dean's Merit Scholarship Recipient (all semesters).

1975-1977

- **UNIVERSITY OF SOUTHERN CALIFORNIA**

Los Angeles, California

Master of Business Taxation, 1977

1971-1975

- **CALIFORNIA STATE UNIVERSITY NORTHRIDGE**

Northridge, California

Bachelor of Science, Business Administration and Accounting

Graduated with Honours & Dean's List

PUBLICATIONS – BOOKS

- CALIFORNIA COMMUNITY PROPERTY. Robert G. Popovich. Casebook (E-Version – self-published) for Popovich’s Community Property Classes (editions: 2020-21, 2021-22, 2022-23).
- CALIFORNIA WILLS AND TRUSTS: CASES, STATUTES, PROBLEMS AND MATERIALS. Robert G Popovich & Peter T. Wendel. Carolina Academic Press, 2017 (ISBN 978-1-61163-674-1).
- Popovich’s Exam Pro – Federal Income Tax – Third Edition West Academic, 2019 (ISBN 978-1-68467-676-7).
- Federal Estate & Gift Tax Chapter in Wendel’s Emanuel Law Outlines: Wills, Trusts, and Estates, Keyed to Dukeminier/Sitkoff, Ninth Edition, Wolters Kluwer October 2014
- Federal Estate & Gift Tax Chapter in Wendel’s Emanuel® Law Outlines: Wills, Trusts, and Estates, 3rd Ed. Wolters Kluwer July 2012
- Popovich’s Exam Pro – Federal Income Tax – Second Edition Thomson/West Publishing Company, July 2007.
- Popovich’s Exam Pro – Federal Income Tax, West Publishing Company, July 2002.

SCHOLARLY PUBLICATIONS – LAW REVIEW ARTICLES

- Robert G. Popovich and Peter T. Wendel, *The State of the Property Course: A Statistical Analysis*, 56 Journal of Legal Education – (2006).
- *Support Your Family But Leave Out Uncle Sam: A Call For Federal Gift Tax Reform*. The Monthly Digest of Tax Articles, 1996 - . Re-publication of the article originally published in 55 Maryland Law Review 343 (1996).
- *Support Your Family but Leave Out Uncle Sam: A Call For Federal Gift Tax Reform*. 55 Maryland Law Review 343 (1996).
- *It Pays to Give It Away - Sometimes: Inter Vivos Charitable Remainder Unitrusts In Estate Planning*. The Monthly Digest of Tax Articles, March 1989, at 30. Re-publication of the article originally published in 15 Pepperdine Law Review 367 (1988).
- *It's All Mine - Or At Least Part of It Is: A California Look At Property Apportionment Between Families Of An Intestate And An Intestate's Predeceased Spouse*. 16 Pepperdine Law Review (301) (1989).
- *It Pays to Give It Away - Sometimes: Inter Vivos Charitable Remainder Unitrusts In Estate Planning*. 15 Pepperdine Law Review 367 (1988).

SCHOLARLY/PEDAGOGICAL ACTIVITIES, OTHER PUBLICATIONS AND PRESENTATIONS

- *Pepperdine Law Review Tax Symposium: Paul Caron's Tax Reform in a Time of Crisis, 2014.*
- *Joint Tenancy v. Community Property: An Analysis and Approach to Property Classification and Distribution.* Panel discussion topic.
- "Section 308" Spouses: Post-November 4, 2008, Legally Valid Same-Sex Marriages, Migration to California, and Application of Community Property: The Marriage Recognition and Family Protection Act of 2009 (SB 54). Panel discussion topic.
- *The Juxtaposition of Cal. Civ. Code §683 and Cal. Civ. Code §5110.730 (Cal. Fam. Code §852): Is Title in Joint Tenancy an Effective Post '84 Transmutation from Community Property to Joint Tenancy?* Panel discussion topic.
- *Study of US Law Schools Awarding "Certificates" for Fields of Study,* included, in part, in "Jurist" magazine article.
- *Current Developments in Estate/Gift Taxation.* Multiple short summaries of significant developments – reports to the University and Law School.
- *Revocable Living Trusts and Community/Separate Property Transmutations: A Drafting Conundrum Solved.* Panel discussion topic.
- Review for Author and Publisher of *California Community Property, Examples and Explanations*, Professor Charlotte Goldberg (Aspen Publishers, 2005).
- Review for Publisher of proposed casebook: *US Taxation of International Operations*, Professor Mark Hoose (Wolters Kluwer, 2012).
- *Tax Consequences of a Teaching Assignment in the U.K.* A comprehensive analysis of the domestic (federal/state) and foreign income and social security taxation for a professor teaching in the London program. Internal Pepperdine document.
- *Charitable Giving and The New Tax Law.* The "Contribution Corner," Pepperdine Law Quarterly (Fall, 1993).
- *How You and The Law School Can Benefit From Outright Gifts.* The "Contribution Corner," Pepperdine Law Quarterly (Summer, 1992).
- *Introduction to Charitable Giving.* The "Contribution Corner," Pepperdine Law Quarterly (Spring, 1992).

- *The 1986 Tax Reform Act: Still Simplifying, While Mostly Complicating, Taxes in 2010.* Panel discussion topic.
- *The Revenue Reconciliation Act of 1993: A Summary by Robert G. Popovich.* A comprehensive analysis of the key features of this 1993 federal tax legislation. Internal Pepperdine document.
- *The Economic Growth and Tax Relief Reconciliation Act of 2001: Through a Slight of Hand, Millions of Dollars Go from the States to the Fed (and Why California is Helpless to do Anything About it).* Panel Discussion Topic.
- *First, We Don't Recognize the Gain and Now We Do: How The Housing and Economic Recovery Act of 2008 Undermines a Simple and Taxpayer-Friendly Law in IRC §121.* Panel discussion topic.
- *The Law School Grading Program: A Computer Program for Professors at Pepperdine University School of Law.* Wrote this computer application program to assist colleagues at the School of Law in computing and compiling examination scores, course grades, and class grade distributions. Eight major programming revisions over twelve years (including Visual Basic and JAVA programming language versions).

SIGNIFICANT LAW SCHOOL SERVICE (Not Including International Programs or University Service – See Separate Headings, Below)

- Note: unless otherwise indicated, the items listed relate to service at Pepperdine.
- Law School financial/budget matters, ABA-related financial, etc.
- Pepperdine Parris Institute – Launch Week (2013-16): various activities including teaching comprehensive “case briefing/mock” classes to incoming first-year students and a separate class for incoming LL.M. students.
- Faculty Supervisor – Tax Practicum Clinic (State Board of Equalization/Franchise Tax Board – TAAP, Tax Appeals Assistance Program).
- Faculty Advisor – Business and Tax Societies (Pepperdine and Southwestern).
- Faculty Advisor – Law Review.
- Guest Lecturer – Advanced Legal Research, Legal Ethics, Supplemental Bar Courses (Pepperdine and Southwestern),

- Law School Curricular Tracks – analysis and major overhaul.
- School Panels, Talks, etc.
- Student Recruitment and Law School Student Orientation.
- Law School Support (Financial), Fundraising, and Alumni-Related.
- Tax, financial/business, estate planning, probate, accounting advice to Colleagues, visiting Colleagues, University employees, etc.
- Pepperdine Board of Visitors – charitable planning presentations.
- Faculty advisor/sponsor – student independent study projects, student internships/externships, mentorships, school moot court teams and first-year appellate arguments
- Student Advising – school, classes, career, etc.
- School of Law Faculty Retreat – presentations and panels.
- “Senior Breakfast” – faculty speaker.
- Law School Committee Service: Special Committees:
 - Special School of Law Committee – Strategic Academic Planning Committee.
 - Special School of Law Committee – ABA & US News and World Report Reporting Committee.
 - Special School of Law Committee – Foreign Programs Committee.
 - Special School of Law Committee – Financial Resources Committee.
 - Special School of Law Committee – Law School Renovation Committee.
 - Committee Chair and member for selection of various student scholarships, awards, special recognition, etc.
 - “Committee on Committees.”
 - Tenure, Promotions, and Faculty Reviews.
 - AALS Committee – AALS House of Representatives.
- Law School Committee Service: Standing Faculty Committees (Served as Chair/Vice Chair majority of years):
 - Admissions and Financial Aid (Pepperdine and Southwestern), Academic Standards, Curriculum, Budget & Long-Range Planning, Global Programs & International LL.M., Career Services, Exam & Grading, Student Relations, Faculty Development (Southwestern), Honor Board (Southwestern), and Others

SIGNIFICANT LAW SCHOOL SERVICE – DIRECTOR OF INTERNATIONAL (GLOBAL) PROGRAMS

- Note: Unless otherwise indicated, the items listed relate to service at Pepperdine.
- Director of International (Global) Programs 2005-2009 – Pepperdine University School of Law with primary responsibility for Law School's resident program in London and student exchange programs with the University of Copenhagen (Denmark), and the University of Augsburg (Germany). The London Program is the Law School's primary program and is actively run by the Law School (not a consortium or shared program), receiving accreditation as a stand-alone program in the early 1980s. The Copenhagen and Augsburg programs are "exchange" programs with very limited enrollment. Most duties, responsibilities, and activities relate to Pepperdine's London Program.
- London Program – General Information
 - The program offered seven-week summer and traditional fall (August – December) semester terms. Pepperdine owns its campus facilities.
 - Pepperdine's London program maintained a year-round resident staff and the campus building has classrooms, a library, study halls, faculty and staff offices, and living facilities for the visiting resident professors and administrators.
 - Academic environment; summer and fall semester with student self-selection of courses.
 - Clinicals/Internships in both summer and fall semesters with students working (for credit) with barristers, solicitors, U.S. law firms and international organizations.
 - International Moot Court – Fall semester program (for credit), competitions with English Barristers at the Royal Court of Justice and the Inns of Court.
- London Program – Duties and Responsibilities Relating to Immigration Matters.
 - Responsibility for faculty, administrator and students (with and without clinical work status) under three different UK immigration entry programs.
 - All necessary compliance criteria (including all visa-related items).
 - All communication with the Home Office UK Border Agency.

- Involved in interpreting and setting guidelines with UK officials for immigration schemes as pertaining to Pepperdine academic programs and students/faculty.
- Worked with British Consulate-General Office in Los Angeles establishing visa processing matrices.
- Drafted documents – all primary and supporting documents relating to UK immigration matters (primarily for students with clinicals/internships).
- Internal Pepperdine (graduate and undergraduate) memos related to the three different immigration systems – explanations, requirements, compliance matrices, etc.
- Liaised with Immigration Offices at London’s Heathrow and Gatwick airports regarding student immigration.
- London Program – UK Resident-based Activities, Duties and Responsibilities (not directly associated with immigration issues).
 - London Campus web services.
 - Assisted Negotiation with NHS (National Health Service) for student coverage.
 - Imperial College – Helped secure leases for classrooms and student/faculty housing.
 - Secured and negotiated contracts, with Imperial College, library, internet, campus eating facilities, and fitness club access and plans for Pepperdine students.
 - Coordinated financial aid for study-abroad students.
 - Student clinicals/internships oversight.
 - Significant Student Trips – Fall Semester:
 - European Institutions Tour. Brussels: Briefings at the General Secretariat at the Council of Europe and European Parliament. Luxembourg: Briefing and Tour of the European Court of Justice. Strasbourg: European Court of Human Rights Briefing and Tour.
 - The Hague Trip. ICTY – International Criminal Tribunal for the Former Yugoslavia – meeting with Judges and Tribunal Representatives. IUSCT – Iran – United States Claims Tribunal – meeting with the nine arbitrators of the tribunal. ICC – International Criminal Court – meeting with members of the Assembly of States Parties, Office of the President of the ICC, and Judges from the various judicial divisions of the

ICC. Peace Palace meeting with ICJ – International Court of Justice and PCA – Permanent Court of Arbitration.

- English Mooting – Organized and managed competitions with English Barristers at the Royal Court of Justice and the Inns of Court.
- London Campus Building Refurbishment – Involved in Law School oversight of implementation.
- Law School Open House and Reception – Co-hosted event with special guest The Right Honourable The Baroness Thatcher LG OM PC FRS (Margaret Thatcher).
- “London Live OCI” – Helped establish live video-conferencing for OCI for London based students.
- Negotiated student book agreements with US publishers and UK book distributors.
- Special Constitutional Law Course with Justice Antonin Scalia and Professor John S. Baker.
- US and UK Customs processing and issues for visiting professors’ school-related and personal effects.
- London Program – Malibu based Activities, Duties and Responsibilities.
 - Web design and HTML programming created and updated Law School website.
 - Student handbook for living abroad, immigration, etc.
 - Ad copy for program advertising and recruiting brochures.
 - Student registration, curriculum, scheduling, financial aid, etc.
 - Oversight of UK clinicals/internships.
 - Annual “English Moots” in Malibu with Pepperdine students and English Barristers – Responsible for all aspects of the events.
- International Programs – ABA Related
 - ABA site inspections (2000 and 2007). Responsible for all work and correspondence with the ABA and site inspectors.
 - ABA annual reports for Part 8 (semester abroad programs)

SIGNIFICANT PEPPERDINE UNIVERSITY (CENTRAL ADMINISTRATION) SERVICE

- Note: Unless otherwise indicated, the items listed relate to service at Pepperdine.
- University Retirement Plan Committee – Representative of the Law School.
- University Tenure Committee – Representative for the Law School.
- ASLC (Advancement of Student Learning Council) – Original Law School Representative for University-wide committee established in conjunction with University WASC accreditation activities.
- University WASC Accreditation Team – Representative for the Law School.
- University Academic Council – Representative for the Law School.
- University Faculty Committee – Representative for the Law School.
- Group Discussion Leader -- University retreats and other University functions.
- University Office of Planned Giving – Advice, counsel, work-product, etc. for active and prospective benefactors.
- University Planned Giving Projects – Advice, counsel, work-product, etc. for active and prospective benefactors.
- University Tax Planning – Advice, counsel, work-product, etc. for University matters relating to University’s tax-exempt status, employee benefit programs, and the like.
- Tax, financial/business, estate planning, probate, accounting advice to University officials, employees, and “friends of the University.”
- “Challenge to Lead” fundraising video – Featured Law School Professor.

PRIVATE PRACTICE EXPERIENCE

1989 - 1990

- **IRELL & MANELLA**

LOS ANGELES, CALIFORNIA

Associate Attorney (Specializing in Domestic and International Tax, and Estate Planning)

1989

- **HELM PURCELL & WAKEMAN**

WESTLAKE VILLAGE, CALIFORNIA

Law Clerk

1983 to 1986

- **SHIPLEY HOFFMAN ASSOCIATES**

CAMARILLO, CALIFORNIA

CPA - Director of Taxes/Financial Planning

1983 to 1986

- **LINDMAR DATA CORPORATION**

CAMARILLO, CALIFORNIA

Chief Executive Officer, Co-Founder, Chairman of the Board

1981 to 1983

- **DELOITTE HASKINS AND SELLS (NOW DELOITTE)/ STRAND WOLFE & LUTTON**

VENTURA COUNTY, CALIFORNIA

CPA – Manager (Specializing in Domestic and International Tax)

1979 to 1981

- **INFORMATICS GENERAL CORPORATION**

WOODLAND HILLS, CALIFORNIA

Director of Taxes

1977 to 1979

- **DELOITTE HASKINS AND SELLS (NOW DELOITTE)**

LOS ANGELES, CALIFORNIA

CPA - Staff Accountant (Specializing in Domestic and International Tax)

CERTIFICATIONS AND PROFESSIONAL MEMBERSHIPS

- Certifications and Professional Licenses:
 - Admitted to Practice of Law, California (1989).
 - Certified Public Accountant (C.P.A.), California (1979).
- Membership in Professional Organizations:
 - American Bar Association (ABA)
 - ABA Section Membership: Taxation, Education, Real Property, Probate and Trust
 - ABA committees (former): Teaching Taxation, Estate & Gift Taxation, VAT and Other Consumption Taxes

- AALS Section Membership (former): Donative Transfers, Fiduciaries and Estate Planning, Taxation
- California Bar Association
- California Bar Association Section Membership: Taxation, Trusts & Estates, Family Law
- Former member of Beverly Hills Bar Association and sections in trusts & estates, family law and taxation.
- American Institute of Certified Public Accountants
- California Society of CP