



# Ronald M. Katz

## Shareholder

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## FOCUS AREAS

Business Law  
Tax & Estates  
Real Estate

## EDUCATION

1980  
Indiana University, Kelley  
School of Business, B.S.,  
business – accounting  
concentration

1983  
Indiana University  
Indianapolis, Robert H.  
McKinney School of Law,  
J.D.

1985  
Georgetown University,  
Georgetown University  
Law Center, M.S., taxation

## ADMITTED TO BAR

Indiana



## BIOGRAPHY

Ronald M. Katz is a co-founding partner of Katz Korin Cunningham PC, and leads the firm's tax, estate and business succession planning practices. He also remains actively involved in representing and advising clients involved in real estate development in the State of Indiana.

"Envisioning opportunities for our clients and our community" is not just a motto for the firm that Ronnie helped foster - it is the foundation of our firm's culture. It requires an understanding of the numbers, client goals, governmental implications and the impact of tax consequences.

The goal is to provide the exceptional legal services efficiently at reasonable rates, without the frustration of delays, excess costs and bureaucracy.

Ronnie counsels on the importance of developing plans that meet the needs of the client. His services include a broad range of other matters that may be required as part of the planning process. With respect to estate planning matters, this may involve entity agreements, real estate transfers, and coordinating beneficiary designations of retirement accounts and life insurance with a client's overall plan. Ronnie also represents and advises beneficiaries of estate and trusts, and advises corporate and individual trustees regarding their responsibilities. With the assistance of our firm's litigation group, Ronnie also initiates and defends claims on behalf of heirs and beneficiaries.

For the past several years, Ronnie has strongly advocated that medical and legal professionals take a greater proactive role in advocating for their respective patients and clients about end-of-life decisions. He has focused his research and education on the legal, ethical and practical implications for patients, physicians, caregivers and attorneys.

Ronnie has served as an adjunct Professor of Law and guest lecturer for the Indiana University Robert H. McKinney School of Law (Real Estate Transactions; Trust & Estates) and, since 1993, has taught the Indiana Bar Review courses on Real Estate Law and Probate, Wills, Trusts and Administration. He has been involved in educating his peers for the past quarter century, primarily through continuing legal education courses offered through The Indiana Continuing Legal Education Forum, the Indianapolis Bar Association and the American Bar Association.

In serving as an engaged stakeholder in our community, Ronnie has supported several arts and civic organizations in the City of Indianapolis during his career, including service as a president of the boards of The Indianapolis Fringe Theatre, Inc., and the Jewish Community Center Association of Indianapolis, a United Way agency. He is particularly proud of his firm's efforts in supporting the Central Indiana arts community.

Ronnie was a 1991 recipient of the Jewish Community Center Martin L. Larner Leadership Development Award, a 1997 recipient of the Jewish Federation of Greater Indianapolis' L.L. Goodman Leadership Award, and a 2009 recipient of the Emile Godfrey Board Service Award issued by Coalition for Homelessness Intervention and Prevention of Greater Indianapolis, Inc. He has been recognized as a *Life Fellow* and *Distinguished Fellow* of the Indianapolis Bar Foundation, a *Fellow* of the Indiana Bar Foundation and as a 2002 recipient of the Indianapolis Bar Association Dr. John Morton-Finney Excellence in Legal Education Award. He also served as the 2005-06 Chair of the Governing Committee of the American Bar Association Forum on Affordable Housing & Community Development Law.

Ronnie originally began his professional career as a certified public accountant, obtaining his CPA license in the State of Maryland in 1984. He is a graduate of the Indiana University Robert H. McKinney School of Law and the Georgetown University Law Center (*LLM in Taxation*).

Martindale-Hubbell® Peer Review Ratings™, the gold standard in attorney ratings, have recognized lawyers for their strong legal ability and high ethical standards for more than a century. Attorneys looking to refer a client, as well as individuals researching lawyers for their own legal needs, use these ratings to identify, evaluate and select the most appropriate lawyer for their legal issue. Ronnie has received the AV Preeminent rating

(the highest rating from this organization) from Martindale-Hubbell since 1992.

## EXPERIENCE

State of Maryland, Licensed CPA

## HONORS

- Indianapolis Bar Association & Foundation - Senior Fellow, 2012; Board of Directors Award, 2017; Distinguished Life Fellow, 2012; Dr. John Morton-Finney Excellence in Legal Education Award, 2002; Distinguished Fellow, 1993
- Coalition for Homelessness Intervention & Prevention, Inc. - Emile Godfrey Board Service Award, 2009
- Indiana State Bar Foundation - Fellow, 2006
- Indiana Super Lawyer<sup>®</sup>, 2006 - 2011, 2020
- Indianapolis Bar Association - Dr. John Morton-Finney Excellence in Legal Education Award, 2002
- Jewish Federation of Greater Indianapolis - L.L. Goodman Leadership Award, 1997
- Martindale-Hubbell - AV Preeminent<sup>®</sup> rating, 1992 - present
- Jewish Community Center Association of Indianapolis - Martin L. Lerner Leadership Development Award, 1991
- Wexner Heritage Program, 1989 graduate of the Wexner Foundation's 3-year education and leadership development program

## LEGAL ORGANIZATIONS

American Bar Association

2005 - 06

American Bar Association Forum on Affordable Housing and Community Development Law

Indiana State Bar Association

Indianapolis Bar Association

2004

Indianapolis Bar Association General counsel

2007

Indianapolis Bar Association Vice President of Board

## SPEAKING AND PUBLICATIONS

- Faculty, *Indianapolis Bar Association Indiana Multi-state Bar Review* [Real Property Law, Personal Property and Wills, Trusts and Probate Administration] (1993 – present).
- Adjunct Faculty (Real Estate Transactions 1995 – 1996) and Guest Lecturer (Trusts & Estates, and Law Practice Management on a periodic basis), Indiana University Robert H. McKinney School of Law (1996 – present).
- Presenter and Author, *Death & Dying: Maximizing Quality of Life and Minimizing Pain and Suffering When Faced with End-of-Life Decisions*, Indiana University College of Health & Human Services, (2013 – present).
- Presenter, *Legal Issues Involving Physician Assisted Dying*, Indiana University School of Medicine, (annually, 2013 – present).
- Faculty, *120 Hot Tips in Probate Practice* – Indiana Continuing Legal Education Forum, Indianapolis, Ind. (2009-2012)
- Presenter, *Legal Issues Impacting ‘End of Life’ Choices, Compassion & Choices of Indiana Fall Program*, Indianapolis, Ind. (2011).
- Author, *A New Season of Dedication*, *ABA Journal of Affordable Housing & Community Development Law*, Vol. 15, No. 4 (Spring 2006).
- Author, *Political Will*, *ABA Journal of Affordable Housing & Community Development Law*, Vol. 15, No. 3 (Spring 2006).
- Presenter and Author, *Winds of Change* – ABA Forum on Affordable Housing & Community Development Law (ABA/AHCDL) Conference on Creating Healthy Communities: Ending Homelessness, St. Louis, Mo. (2006).
- Author, *State of the Union*, *ABA Journal of Affordable Housing & Community Development Law*, Vol. 15, No. 2 (2006).
- Author, *Winds of Change*, *ABA Journal of Affordable Housing & Community Development Law*, Vol. 15, No. 1 (2005).
- Presenter and Author, *HURRICANE KATRINA: Public Housing Aftermath* – Housing & Development Law Institute 22nd Annual Fall Conference, Chicago, Ill. (2005).
- Panelist, *Balancing the Rights of Individual Tenants and the Larger Community* – ABA/AHCDL Conference: Doing Well While Doing Good ~ Building Housing & Community with a Social Justice Perspective, San Francisco, Calif. (2005).

- Panelist, *Hasta La Vista Baby: Roundtable on Nearing the End of Compliance Period* - Indiana Housing Finance Authority Annual Conference 2004, Indianapolis, Ind. (2004).
- Faculty, *The Closing Checklist: An Exhaustive Overview of all the Documents* - 13th Annual ABA/AHCDL Forum Conference, Washington, DC (2004).
- Panelist, *Is Your Deal Under Water? Making a Tax Credit Deal* - Indiana Housing Finance Authority Annual Conference 2003, Indianapolis, Ind. (2003).
- Faculty, *Working Successfully with Community Agencies and Officials* - Urban Revitalization: An Affordable Housing Conference, Chicago, Ill. (2003).
- Faculty, *Overcoming Obstacles in Tax Credit Compliance* - ABA/AHCDL 12th Annual Conference, Washington, DC (2003).
- Panelist, *Community Development Initiatives* - Indianapolis Neighborhood Housing Partnership's Housing Summit, Indianapolis, Ind. (2003).
- Faculty, *Affordable Housing and Community Development Initiatives* - International Project Finance, Investment, and Business Development, Center for International Legal Studies, Steamboat Springs, Colo. (2003).
- Faculty, *Current Issues in Estate Administration and Trusts*, Annual Indiana Law Update, Indiana Continuing Legal Education Forum, Indianapolis, IN (2002).
- Panelist, *Need Some Coaching? Choose a Consultant*, Indiana Housing Finance Authority Annual Conference (2002).
- Faculty, *Developers Tool Belt: Soft vs. Hard Financing*, Urban Revitalization: An Affordable Housing Conference, Chicago, IL (2002).
- Faculty, *Advanced Tax Credit Issues (Expiring Use, Increased Allocation, State QAP)*, New Approaches to Developing Affordable Housing and Creating Economic Developments, The Association of the Bar of the City of New York, New York, NY (March 30, 2001).
- Author, *Housing Tax Credits in Indiana*, METRO Publishing Co., Inc. (1994 and periodically updated through 2001).
- Co-author, *Housing and Development Forms and Commentary*, West Group Publishing (1996 and annually updated through 2001).
- Faculty, *New Markets Tax Credit*, Urban Revitalization: An Affordable Housing Conference, Chicago, IL (July 19-21,

2001).

- Faculty, *Ethical Considerations in Estate Planning and Probate*, Current Estate Administration Issues Seminar, co-sponsored by Indiana Continuing Legal Education Forum and Banc One Investment Management Group, Jeffersonville, IN (October 5, 2000).
- Panelist, *Creative Partnerships*, Indiana Housing Finance Authority Annual Conference (2000).
- Faculty, *Utilizing Low-Income Housing Tax Credits, Racing Ahead in Housing*, National Association of Housing and Redevelopment Officials Annual Meeting, Indianapolis, IN (May 22 - 23, 2000).
- Faculty, *Tax-Exempt Private Activity Bond Workshop*, sponsored by Novogradac & Company, LLP, Indianapolis, IN (February 23, 2000).
- Faculty, Joint Ventures between Not-for-Profits and Private Developers: Negotiating the Partnership Agreement, Affordable Housing and Community Development: The State of the Art, co-sponsored by ABA/AHCDL and The Association of the Bar of the City of New York, New York, NY (January 28, 2000).
- Faculty, *Fundamentals of HOME/RHTC*, Indiana Housing Finance Authority Annual Conference (September 2, 1998).
- Faculty, *Apartment Association Tax Credit Seminar*, Apartment Association of Indiana, Indianapolis, IN (August 20, 1998).
- Faculty, *Structuring the Development and Development Team; Determining Sources and Uses & Amount of Credits; Dotting Your "Eyes" and Crossing the "Tees" in Your Application*, Indiana Housing Finance Authority Rental Housing Tax Credit Seminar, Indianapolis, IN (October 31, 1997).
- Faculty, *Current Issues for Low-Income Housing Tax Credit Project Owners and Advisors*, Challenges and Opportunities in Affordable Housing and Economic Development in New York and Beyond, co-sponsored by ABA/AHCDL and The Association of the Bar of the City of New York, New York, NY (March 21 - 22, 1997).
- Faculty, *Issues in Tax Credit Compliance, A Whole New Ball Game*, Indiana Housing Finance Authority Annual Conference (1996).
- Instructor, *Understanding and Using Housing Tax Credits in Indiana*, Indianapolis Bar Association Seminar, (January 23, 1996).
- Instructor, *Tax Credits and Financing*, ICLEF Commercial

Real Estate, Indiana Continuing Legal Education Forum (October 13 - 14, 1994).

- Faculty and Chair, *The Nuts & Bolts of Tax Credit Development in Indiana: A Presentation on Housing Tax Credits in Indiana*, co-sponsored by the Indianapolis Bar Association and the Apartment Association of Indiana, Indianapolis, Ind. (January 28, 1994).
- Instructor, *Section 42 Tax Credits for Affordable Housing Development*, Central Indiana Society of the Institute of Certified Financial Planners Seminar (August 17, 1993).
- Instructor, *Section 42 Tax Credits for Low to Moderate Income Housing*, Indiana Bankers Association Conference (December 10, 1992).
- Instructor, *Apartment Management Legal Issues*, National Association of Home Builders Resident Apartment Management Courses (1991 - 2000).
- Instructor, *Real Estate Law*, Apartment Association of Indiana Certified Apartment Management Courses (1989 -1992).
- Faculty, *Taxation of Partnerships*, Indiana Society of Enrolled Agents Annual Seminar, Indianapolis, Ind. (June 19 - 20, 1989).

### **CIVIC ENGAGEMENT / VOLUNTEERISM**

- President (2020) & Board of Directors, Indiana Federal Community Defenders, Inc. – 2017 - present
- Member, John S. Grimes Advisory Committee to the Indiana University Foundation – 2012 - present
- Board of Directors, Compassion & Choices of Indiana – 2010 - 2018
- Board of Directors, IndyFringe (Indianapolis Fringe Theatre, Inc.) – 2010 - 2014
- Past President & Board of Directors, Jewish Community Center Association of Indianapolis – 1985 - present
- Board of Directors, The Phoenix Theatre – 2014 - 2016
- National Advisory Board, Housing and Development Reporter, Thompson West Group Publishing – 1994 - 2011
- Board of Directors, Coalition for Homelessness Intervention and Prevention of Greater Indianapolis, Inc. (CHIP) – 2003 - 2009
- Board of Directors. JCCA of North America – 2004 - 2010
- Planning Committee, Indiana Housing Finance Authority Annual Conference on Affordable Housing – 1997 - 2002

- Board of Directors, Jewish Federation of Greater Indianapolis – 1991 - 2000
- Board of Directors, Indiana Equity Fund – 1994 - 2008
- Board of Directors, Congregation Beth El Zedeck – 1992 - 1995