

Julia E. Schall

ASSOCIATE

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Julia Schall is an Associate in the Probate and Estate Planning Group practicing out of both the Grand Rapids and Detroit offices. Ms. Schall concentrates her practice in the areas of estate planning, estate and trust administration, family office counseling, and tax law.

Prior to joining Miller Johnson, Ms. Schall was a Manager of Wealth Management Tax for a leading provider of investment advisory, trust, tax, and insurance services in Michigan. She was a Senior Tax Consultant for a Big Four accounting organization working with Michigan-based Fortune 500 companies on audit and corporate taxation matters, worked on several national specialized consulting projects, and was a member of the private client service team serving as an advisor for high net worth family offices and providing complex tax compliance services.

Estate Planning

Practice Areas

- [Estate Planning](#)
- [Personal Taxation](#)
- [Personal Legal Services](#)

Education

- J.D., Michigan State University College of Law, 2012
- B.A., Michigan State University, 2009

Bar Admissions

- Michigan

Honors

- *International Law Review*, Member
- Judicial extern to the Honorable Robert Ziolkowski in the 3rd Judicial Circuit Court

Professional Affiliations

- State Bar of Michigan
- Michigan Women's Tax Association

Ms. Schall provides consulting and estate planning services for entity and high net worth individual clients. She focuses on management of individual and trust income tax planning, wealth transfer among family members, and charitable contribution planning.

Estate and Trust Administration

Ms. Schall advises clients in setting up trusts and making gifts to accomplish their estate planning goals. She also assists clients with issues pertaining to household employees including payroll and withholding requirements.

Family Office Counseling

Ms. Schall has worked with high net worth families in Metro Detroit and Chicago with individual and trust income tax planning and wealth transfer among family members and related tax compliance. She provides in depth communication with clients regarding various tax issues and management of their accounts and internal tax teams.

Taxation

Ms. Schall executes tax research and technical memorandum for entity and high net worth individual clients. She consults with outside advisors and accounting professionals on income tax compliance related matters. She has resolved income tax controversy issues for multi-state jurisdictions as well as the Internal Revenue Service. She has been involved in numerous special projects related to tax reform, including writing and communicating technical positions.

Education

Ms. Schall earned her J.D. from the Michigan State



University College of Law in 2012. While in law school, Ms. Schall was a Tax Clinician with the Alvin L. Storrs Low-Income Taxpayer Clinic preparing individual tax returns and negotiating offers in compromise and payment plans with the IRS and State of Michigan. She was a member of the *International Law Review*.

During law school, Ms. Schall was a judicial extern to the Honorable Robert Ziolkowski in the 3rd Judicial Circuit Court.

Ms. Schall received her B.A. in General Business Administration – Pre-Law, with a specialization in International Business from Michigan State University in 2009. She was a member of the national business fraternity Phi Chi Theta and served as elected board treasurer. She was also a member of the Broad College of Business Student Senate where she chaired the external affairs committee leading community involvement projects and fundraising activities. She also volunteered as a site leader for the Volunteer Income Tax Assistance (VITA) program.

Professional Affiliations and Activities

Ms. Schall is a member of the State Bar of Michigan and admitted to practice in Michigan. She is a member of the Michigan Women’s Tax Association.

Ms. Schall has completed the *Probate & Estate Planning Certificate Program 2022*, a systemic training program developed by Institute of Continuing Legal Education and the Probate & Estate Planning Section of the State Bar of Michigan.

Community Activities

Ms. Schall is actively involved in Bottle Babies Rescue, a Plymouth, Michigan based organization that rescues and rehabilitates dogs and cats through in-home



fostering in preparation for adoption.

