

# Curriculum Vitae

## Robert George Popovich

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### TEACHING EXPERIENCE

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August 1, 1990 - Present

- **PEPPERDINE UNIVERSITY SCHOOL OF LAW**

Professor of Law

Current Course/Subject Repertoire: Federal Income Taxation, Federal Estate and Gift Taxation, Community Property, Estate Planning Seminar, Wills and Trusts, and Contracts I and II (now combined). Developing new "Survey of International Tax" course.

Average annual aggregate class enrolment, exclusive of summer school, is typically between 300 to 400 students, with an average annual teaching unit-load, exclusive of summer school, 12-14 units.

Other Subjects Taught: Tax Practice Procedure and Research, Accounting for Lawyers, and Tax Practicum Clinic (California State Board of Equalization/Franchise Tax Board).

In all of my years teaching (since 1991) I have never had a "reduced teaching load" in any semester, nor have I ever requested a sabbatical (i.e., I have taught a full load of courses every semester of my teaching career)

Other School Teaching and Other Related: See **SIGNIFICANT LAW SCHOOL SERVICE**, below and referenced CV addendum).

## FULL-TIME VISITING PROFESSORSHIPS

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Fall 2011

- **SOUTHWESTERN LAW SCHOOL – LOS ANGELES**  
Visiting Professor of Law; taught 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; taught Contracts I & II (Two Sections, B and C), and Community Property.

Fall 2008 (full semester)

- **PEPPERDINE UNIVERSITY SCHOOL OF LAW LONDON PROGRAM**  
Professor-in-Residence in London; taught Federal Income Taxation (4-unit course) and Community Property (3-unit course)

Summer 2000

- **PEPPERDINE UNIVERSITY SCHOOL OF LAW LONDON PROGRAM**  
Professor-in-Residence in London; taught Federal Income Taxation (4-unit course)

## ADJUNCT TEACHING EXPERIENCE

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1983 - 1986

- **UNIVERSITY OF LA VERNE**
- Adjunct Professor (Graduate MBA Program – Taught while practicing as a CPA prior to attending Law School).

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

## TEACHING AWARDS

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Introduction: Teaching is an integral component of my professorial life and for which I have a sincere passion. While I receive the most meaningful rewards for such duties on a daily basis (through my students' achievements), I have been honoured to be the recipient of the following teaching-related awards:

2015-2016 Academic Year

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

2009-2010 Academic Year

- **TEACHER OF THE YEAR AWARD – SOUTHWESTERN LAW SCHOOL**  
(de facto award winner but I voluntarily withdrew my name as the recipient)

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**  
One of nine professors recognized University-wide for teaching excellence (Eligible to receive this award once every five years).

2005-2006 Academic Year

- **TEACHER OF THE YEAR AWARD – PEPPERDINE UNIVERSITY SCHOOL OF LAW STUDENT BAR ASSOCIATION**  
Received award in the second year of its founding (eligible to receive this award once every three years; received award again in first year of eligibility – see above).

1997-1998 Academic Year

- **HARRIET AND CHARLES LUCKMAN DISTINGUISHED TEACHING FELLOW (1997–2002) – PEPPERDINE UNIVERSITY**  
One of nine professors recognized University-wide for teaching excellence (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**

One of 9 professors recognized University-wide for teaching excellence (Received award in 1993 after three years of service – first year of eligibility. Was the first non-tenured professor to receive this award. Eligible to receive award once every five years; received award again in first year of eligibility – see above).

## EDUCATION

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1983-1986

- **PEPPERDINE UNIVERSITY SCHOOL OF LAW**

Malibu, California

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

Class Rank: Number 1 out of 184 (At the time, graduated with the highest GPA in Law School's history – approximately 15% above the then previous highest graduating GPA)

Honours/Activities:

Law Review Business Editor, 1988/89.

Law Review, Member 1987-89.

American Jurisprudence Awards and Highest Class Score (Eleven Classes including Contracts, Corporations, Corporate Taxation, Business Planning, Estate and Gift Taxation, Taxation of Property Transactions, Legal Research & Writing (2), Professional Responsibility, Real Estate Finance, Wills & Trusts).

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

Masters of Business Taxation, 1977 (Successor to Law School's LL.M. program). Highest Class Score in Tax Research, Writing & Procedure, and International Tax.

1971-1975

- **CALIFORNIA STATE UNIVERSITY NORTHRIDGE**

Northridge, California  
Bachelor of Science, Business Administration and Accounting  
Graduated with Honors.  
Dean's List.

## **PUBLICATIONS – BOOKS**

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- CALIFORNIA WILLS AND TRUSTS: CASES, STATUTES, PROBLEMS AND MATERIALS. Robert G Popovich & Peter T. Wendel. Brand new casebook (approximately 900 pages being used in current Wills & Trusts Classes and slated for publication Fall 2016). Carolina Academic Press.
- Popovich's Exam Pro – Federal Income Tax – Third Edition (totally revised 600+ page edition), West Academic (slated for publication Fall 2016).
- 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 (totally revised 600+ page edition), Thomson/West Publishing Company, July 2007.
- Popovich's Exam Pro – Federal Income Tax, West Publishing Company, July 2002.

## **SCHOLARLY PUBLICATIONS – LAW REVIEW ARTICLES**

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- 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 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 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).

## WORKS-IN-PROGRESS

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- *The Death of the American Taxpayer – an international comparative study of national/citizenship vs. territorial based taxation for individuals and recent changes to US tax law for persons renouncing their US citizenship. How this ties into the inaccurate, but perceived, benefits of off-shore holdings, the common world perception of situs/territorial-based taxation, and, of all things, how the new US provisions could be incorporated into an integrated estate/gift tax and income tax systems.*
- *The New Age of Tax-Exempt Financing for American Indian/Native American Tribes with the American Recovery and Reinvestment Act of 2009 – But it Lasted for Only a Short Time -- Why?*
- *Revocable Living Trusts and Community/Separate Property Transmutations: A Drafting Conundrum Solved.*
- *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.*
- *"Flower bonds" revisited – a link to historical flower bonds (US bonds used for estate tax payments) to a new form of national debt instrument/investment for tax liabilities.*
- *A Proposal for Change: Tax-Exempt Financing for American Indian/Native American Tribal Functions and Conduit Financing.*
- *The Tax Ramifications for the Visiting Professor.*
- *Muslims in America, Home Financing and the Deduction of Interest Where there is No Interest: Substance over form in Favor of the Taxpayer.*

## **SCHOLARLY/PEDIGOGICAL ACTIVITIES, OTHER PUBLICATIONS AND PRESENTATIONS**

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- *Pepperdine Law Review Tax Symposium: Paul Caron's Tax Reform in a Time of Crisis, 2014. Closing Remarks: What Have We Learned Today?*
- *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 a twelve-year period (including Visual Basic and JAVA programming language versions).

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

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- **Please see attached CV Addendum I – Significant Law School Service for additional information relating to each item listed below.**
- Law School financial/budget matters, ABA-related financial, etc.
- Pepperdine Parris Institute – Launch Week (past three years): 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.
- Guest Lecturer – Legal Ethics.



- Guest Lecturer – Supplemental Bar Courses (Pepperdine and Southwestern).
- New Course Development.
- Substantial Course Curriculum Revisions.
- 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.
- Faculty advisor/sponsor – student internships/externships.
- Faculty mentor for students.
- Coach – school moot court teams.
- 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:

- Admissions and Financial Aid (eleven years total, chair or vice-chair for eight years). Admission matters related to entering first-year class, transfer students, selection of “faculty scholars” and recruiting (see below). For 2016, I personally called and actively recruited well in excess of 100 admitted students.
- Academic Standards (seven years total, chair or vice-chair for three years).
- Curriculum (six years total, chair or vice-chair for four years).
- Budget & Long Range Planning (five years total, chair or vice-chair for three years).
- Global Programs & International LL.M.) (two years total, vice-chair for one year).
- Career Services (two years).
- Exam & Grading (two years).
- Student Relations (one year).

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

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- Please see attached **CV Addendum II – Significant Law School Service – Director of International (Global) Programs** for additional information relating to each item listed below.
- 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 1980’s. 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
  - Program offers seven-week summer and traditional fall (August – December) semester terms. Pepperdine owns its campus facilities.
  - Pepperdine’s London program maintains 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 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.
    - Helped Negotiate NHS (National Health Service) coverage.
    - Imperial College – Assisted with securing leases for classrooms and student/faculty housing.

- Assisted in negotiating and securing 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 – Assisted in organization and management of 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**

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- **Please see attached CV Addendum III – Significant Pepperdine University (Central Administration) Service for additional information relating to each item listed below.**
- University Retirement Plan Committee – Representative of the Law School. (Invited and selected to serve a three-year term, beginning Spring 2016).
- University Tenure Committee – Representative for the Law School (2015/16).
- 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

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1989 - 1990

- **IPELL & 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, Chairman of the Board

1981 to 1983

- **DELOITTE HASKINS AND SELLS / 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 & Touche)**  
LOS ANGELES, CALIFORNIA  
CPA - Staff Accountant (Specializing in Domestic and International Tax)

## **CERTIFICATIONS AND PROFESSIONAL MEMBERSHIPS**

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- 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:
    - Teaching Taxation
    - Estate & Gift Taxation
    - VAT and Other Consumption Taxes
  - AALS Section Membership:
    - Donative Transfers, Fiduciaries and Estate Planning
    - Taxation
  - California Bar Association
  - California Bar Association Section Membership:
    - Taxation
    - Trusts & Estates
  - 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 CPA's

# Addendum I

## **SIGNIFICANT LAW SCHOOL SERVICE (Not Including International Programs or University Service)**

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- Responsibilities relating to Law School financial/budget matters including the following:
  - ABA Annual Report – Assisted in analysis and preparation of the financial materials (Prior Part 6, Fiscal Information).
  - ABA 2016 Site Inspection – Assisted in analysis and preparation of relevant financial materials.
  - Analysis and preparation of the study abroad materials (Part 8, Semester Abroad Programs).
  - School Reputation Enhancement – Charged with task of ascertaining the Law School’s reputation/ranking related to accounting reporting criteria.
  - ABA (domestic) site inspection documents, inspection team discussions, etc., as they related to the Law School’s financial reporting and study abroad programs.
  - Analysis and preparation of periodic financial reports including comparative data analysis (from all reporting law schools) for central university administration for purposes of obtaining a more favorable allocation of Law School revenue to University overhead (i.e., a lower Law School net contribution to parent University overhead).
  - Authored numerous internal studies related to financial matters including global programs, self-study reports, short-term and long-term Law School goals (strategic academic plans), etc.
  - Counseled Law School Deans about financial matters relating to meetings, briefings, and presentations for various University-level (Central Administration) matters (including preparation of supporting memos, “talking point” sheets, checklists, etc.).
- Faculty Advisor to the Business and Tax Law Society (1995 – Present). Established and supervised ongoing VITA (Voluntary Income Tax Assistant) program that provides students with the opportunity to work with disadvantaged taxpayers.



- Pepperdine Parris Institute – Launch Week (past three years): various activities including teaching comprehensive “case briefing/mock” classes to incoming first-year students and a separate class for incoming LL.M. students.
- Southwestern Law School (Academic Year 2011/12). Faculty Advisor to the Tax Law Society. Working with students in various tax-related projects including a very active VITA program.
- Former Faculty Advisor to the Law Review for eight years. Monitored and assessed Law Review policies and practices. Prepared a major Law Review revision proposal that was implemented by the faculty.
- Guest lecturer on tax research for eight years in colleague’s Advanced Legal Research course.
- Taught a section in colleague’s Legal Ethics course.
- Taught supplemental bar courses in Community Property and other subjects (every summer since 1993).
- Southwestern Law School. Guest lecturer in Dean Parrish’s Fall 2011 Advanced Topics Course (Community Property)
- Developed new three-unit Tax Practice, Procedure and Research course.
- Substantially revised curriculum in the following courses: Federal Estate & Gift Taxation, Accounting for Lawyers, and the Estate Planning Seminar
- Revised the Law School Curricular Tracks materials and conducted a comprehensive summary of all ABA accredited law schools’ designations of specialized fields of study.
- School Panels, Talks, etc. – Student Career Development Related: Numerous separate occasions, have given student talks and served on panels relating to career development. Have also participated in student “job fairs.” Discussion topics have included legal and legal-related careers in tax, alternative careers in tax, careers in estate planning, clerkship opportunities in the US Tax Court, and careers with the Treasury Department. Other student career-related activities include writing letters of recommendations (for job opportunities, judicial clerkships, externship grants, admission to LL.M. programs, etc.)
- Student Recruitment, and Law School Student Orientation – numerous activities including the following:

- Served as a speaker, panelist, and as “sample class” professor for numerous Law School “open house” (for admitted students), student orientations, and “Family Day” functions.
- Southwestern Law School: Attended admitted student events in 2009 & 2011, conducted mock class for “Family Day” event, opened my classes to numerous admitted students visits, etc.
- Annual Law School recruiting activities (student admissions) including Law Forums in Los Angeles, Chicago, Atlanta and San Francisco, Law School Fairs (throughout the country), and “Grad School” Fairs (throughout the country)
- Southwestern Law School. Volunteered services to the Admissions Office and was the Law School representative to the 2011 “Grad School” Fair at Loyola Marymount University.
- As chair, vice-chair and member of the admissions and financial aid committee, worked extensively in admitting first year classes, transfer students, selection of “faculty scholars,” etc.
- Law School Support (Financial), Fundraising, and Alumni-Related:
  - Life Associate (Pepperdine Law School)
  - Life Associate predated by Annual member of Pepperdine Law Associates (1990 - 1995). (Monetary contributions to the Law School) and additional contributions in 2015.
  - Participated in the Law School’s “1% Society.”
  - Patron of the R.Wayne Estes and Jamie Phillips Endowed Scholarship Funds.
  - Patron of the London Program Fund Raising campaign (in excess of \$6,000).
  - Southwestern Law School: Member of the “Dean’s Advisory Council” 2009/10, 2011/12 and 2015/16. Public Interest Law “Platinum” member 2011, and Auction participant (with Professor Carpenter) in 2009.
  - Annual contributor (auction item or monetary) to Student A.P.I.L. (The Association for Public Interest Law) at Pepperdine.
  - Active participant in numerous Alumni and Fundraising events.
  - Provide advice to alumni (and their families) on various tax, probate, financial/business, accounting and estate planning matters. Have also prepared and reviewed estate planning documents, tax returns, tax memos, and other related materials. This work is always provided without charge.

- Involved in the Law School's component of University Fundraising Campaigns including preparation of documents, budgets, strategic financial goals, etc.
- Provide advice to Colleagues (and visiting colleagues), University employees and "friends of the University" on various tax, probate, financial/business, accounting and estate planning matters. Have also prepared and reviewed estate planning documents, tax returns, tax memos, and other related materials for colleagues (and visiting colleagues). This work is always provided without charge.
- Group discussion leader for Board of Visitors program dealing with charitable giving and the Law School.
- Faculty advisor/sponsor for numerous student independent study projects in various legal fields including income taxation, estate and gift taxation, estate planning, community property, and contracts (average two to five independent studies per year).
- Faculty sponsor for numerous students externships.
- Faculty mentor for numerous students who were on academic probation or who's performance in the first year of law school classes placed them at risk of future academic dismissal (number of students mentored varies from year to year, but typically mentor two to four students per year).
  - Southwestern Law School: Worked with numerous students who were on "academic probation" or otherwise "at-risk."
- Coached numerous practice rounds for various inter-school moot court teams.
- General Student Advising (current and former students) – Have met with, advised and offered support for hundreds of students (current and former) on law school and career path issues, and matters of a personal nature.
  - Southwestern Law School. Similarly advise students and have twice participated in "Table Days" events.
- School of Law Faculty Retreat – panel member for various presentations and discussions (at least ten such presentations).
- "Senior Breakfast" -- Selected as faculty speaker numerous times.
- Law School Committee Service: Special Committees:
  - 2006/07 & 2007/08 **Special School of Law Committee – Strategic Academic Planning Committee**. Wrote various components of major new plan with primary responsibility for

sections of school finance, budget, fundraising, and special programs.

- 2006/07 & 2007/08 **Special School of Law Committee – ABA & US News and World Report Reporting Committee.** Primary responsibility for preparing financial-related elements of reports submitted by the Law School.
- 2007/08 **Special School of Law Committee – Foreign Programs Committee.** Responsible for assessment and major portions of substantial written report to the Central University senior administration relating to future increased activities in the globalization of Law School programs.
- 2005/06 **Special School of Law Committee – Financial Resources Committee.** Responsible for empirical research and wrote substantial report for Law School presentation to Central University senior administration, resulting in substantial (favorable) change funds allocations to the Law School.
- 2004-2009 **Special School of Law Committee – Law School Renovation Committee.** Worked with architects, interior design and general contractors for major renovation of Law School facilities including classrooms, atrium, and library. Contributed to budget process and presentations to faculty, staff, students, and University (central administration) officials.
- Continuing – Committee Chair for annual selection of student recipient of the “Scott H. Racine Award for Excellence in the Study of Taxation.”
- 1994-2000 – Committee Chair for selection of annual student recipient of the Barbara A. Shacochis Scholarship.
- 2006 – Committee member for selection of Public Interest Law scholarship recipient.
- 1992-1998 – Committee member for selection of student graduation speaker.
- Twice served on the “Committee on Committees.”
- Tenure, Promotions, and Faculty Reviews. Member of various teams responsible for annual reports for Colleague review, promotion and tenure.
- AALS Committee. School representative to AALS House of Representatives.
- Law School Committee Service: Standing Faculty Committees:
  - 2016/17 Admissions and Financial Aid (Vice Chair)

- 2015/16 Admission and Financial Aid (Chair)
- 2014/15 Admissions and Financial Aid (Vice Chair)
- 2013/14 Admissions and Financial Aid (Chair)
- 2012/13 Admissions and Financial Aid (Vice Chair)
- 2011/12 Admissions and Financial Aid (Southwestern Law School Fall 2011, Curriculum).
- 2010/11 Admissions and Financial Aid (Chair).
- 2009/10 (Southwestern Law School – Foreign Student LL.M.).
- 2008/09 Global Programs (Vice Chair).
- 2007/08 Admissions & Financial Aid.
- 2006/07 Curriculum (Vice Chair). Substantial empirical research and assessment leading to first-year and upper-division curriculum revisions.
- 2005/06 Curriculum (Vice Chair).
- 2004/05 Admissions & Financial Aid (Chair).
- 2003/04 Admissions & Financial Aid.
- 2002/03 Curriculum (Chair).
- 2001/02 Admissions & Financial Aid (Chair).
- 2000/01 Admissions & Financial Aid (Vice Chair).
- 1999/00 Curriculum (Chair).
- 1998/99 Academic Standards (Vice Chair).
- 1997/98 Academic Standards (Vice Chair).
- 1996/97 Academic Standards, and Budget/Long Range Planning.
- 1995/96 Budget/Long Range Planning (Chair), and Academic Standards.
- 1994/95 Career Services, and Budget/Long Range Planning.
- 1993/94 Career Services (Including Summer, 1993), and Budget/Long Range Planning.
- 1992/93 Budget/Long Range Planning (Vice Chair), and Academic Standards.
- 1991/92 Curriculum, and Exam & Grading (Vice Chair).
- 1990/91 Exam & Grading, and Student Relations.

## Addendum II

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

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- 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 1980's. 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
  - Pepperdine's Law School London Program consists of a seven-week summer and traditional fall (August – December) semester terms. Pepperdine owns its campus facilities which are located in the Knightsbridge/South Kensington area of London (across the street from the main campus of London's Imperial College).
  - Pepperdine's London program maintains 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 professor. The Law School shares the campus building, for various periods during the year, with Pepperdine's undergraduate Seaver College.
  - The academic environment includes a full compilation of international and domestic law courses with students self-selecting courses and other academic-related activities (see below). A typical fall semester will offer six to eight classes in addition to extra-curricular activities for unit credit (the summer session typically offers about half as many classes).
  - Clinicals/Internships – In both the summer and fall programs, students are permitted (with proper immigration status) to engage in legal-related work and receive academic unit credits. Students placements are with barristers, solicitors, U.S. law firms and international organizations.

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- International Moot Court – In the fall semester program, students may participate, for unit credit, in a comprehensive moot court program. Participating students attend classes on how to moot “English Style,” and then participate in a variety of competitions with English Barristers at the Royal Court of Justice and the Inns of Court.
- London Program – My 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.
  - Established all necessary compliance criteria, created all documents and other materials for the current UK Border Agency “points-based” (tiered) immigration system (this new system was implemented in March 2009 and departed, significantly, from the previous two UK student entry/immigration schemes). The points-based system is of primary concern for students with prospective clinical placements and faculty with duties beyond classroom teaching (or extended periods of residency).
  - Liaised with Home Office UK Border Agency representatives in the UK and US.
  - Participated in interpretation and setting guidelines for all three UK immigration schemes pertaining to:
    - Students working in clinical/externship positions for summer sessions, fall sessions and sandwiched summer/fall sessions.
    - Visiting Faculty (and family) for summer or fall sessions.
    - Visiting Faculty/Administrators for summer, fall and off-season spring sessions.
  - Worked with British Consulate-General Office in Los Angeles.
    - Established line of direct communication for ongoing UK visa processing and immigration issues.
    - Developed processing matrices for student work visas (students with clinical positions), and student visitors (those without clinicals in the UK).
    - Developed processing matrices for faculty and administrators (and families) for applicable categories of entry visa/permit requirements – expedited permit/visa processing.

- Drafting documents –primary and supporting documents including:
  - Student financial aid and bank reference materials.
  - University guarantees for student financial matters (tuition, living costs, etc.).
  - Work study required materials.
  - Course of Study compliance materials.
  - Visa processing checklist.
  - Pepperdine UK visa compliance materials.
    - Student documents.
    - Faculty/Admin work-permit documents.
  - Document travel immigration packages for students, faculty and administrators.
- Internal Pepperdine (graduate and undergraduate) memos related to the three different UK immigration systems – explanations, requirements, compliance matrices, etc.
- Liaised with Immigration Offices at London’s Heathrow and Gatwick airports regarding student immigration including:
  - Memos confirming compliance with UK entry requirements.
  - Lists of students prior to their arrival for expedited immigration.
- London Program – UK Resident-based Activities, Duties and Responsibilities (not directly associated with immigration issues).
  - London Campus IT services – maintenance, support and primary responsibility for computer network including campus server, Wi-Fi, access stations, classroom AV and IT, etc.
  - Helped Negotiate NHS (National Health Service) for long-term student visa holders, and pay-for-service programs for non-visa students.
  - Assisted in securing classroom leases for the Law School with Imperial College.
  - Helped negotiate student and faculty housing with Imperial College.
  - Secured full library access at Imperial College for all London-based students.
  - Negotiated fitness center contracts for Pepperdine students at Ethos Club (Imperial College).



- Secured Pepperdine student access to Imperial College graduate eating facilities and negotiated discount student meal program.
- Secured Pepperdine student access to Imperial College wired and wireless computer networks.
- Coordinated financial aid for study-abroad students from Pepperdine, and worked with visiting students' financial aid consortium agreements.
- Some oversight of student clinicals/internships including meeting with employers, student diary review, student hour confirmations, end of job assessments, etc.
- Student Trips – Shared responsibility for logistics (organization and supervision) for the following Student excursions:
  - European Institutions Tour - logistics of week-long trip to Brussels, Luxembourg City and Strasbourg including:
    - Transportation, lodging and meals.
    - Brussels:
      - Briefing at the General Secretariat at the Counsel of Europe.
      - Briefing and Tour of the European Parliament.
    - Luxembourg:
      - Briefing and Tour of the European Court of Justice.
    - Strasbourg:
      - European Court of Human Rights Briefing and Tour.
  - The Hague Trip
    - Meals and lodging.
    - 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
  - PCA – Permanent Court of Arbitration
- English Mooting – Duties and Responsibilities.
  - “Mega Moot” – competitions with English Barristers at the Royal Court of Justice and the Inns of Court.
  - Liaised with Law Lords, Queen’s Council, and Benchers.
  - Liaised with representatives of the Inns of Court for final mooting rounds at official dinner events.
- London Campus Building Refurbishment – Law School Duties relating to oversight of multi-million dollar refurbishment of London Campus Building including:
  - Classroom design and implementation including IT oversight/testing/implementation.
  - Mediated dispute with plumbing and heating contractors.
- Law School Open House and Reception – Co-hosted event with special guest The Right Honourable The Baroness Thatcher LG OM PC FRS (Margaret Thatcher).
- Established “London Live OCI” – live video-conferencing for OCI interviews with Pepperdine London-based students.
  - Negotiated supplemental high-volume trunk line/broadband internet agreement with Imperial College.
  - Secured necessary video conferencing hardware and software.
  - Built OCI video conference “studio.”
  - Scheduled and supervised live video conference interviews.
- Negotiated student book purchase and buy-back agreements with U.S. publishers and UK book distributors.
- Helped Organize Special Constitutional Law Course with U.S. Supreme Court Justice Antonin Scalia and Professor John S. Baker.
  - Logistics including obtaining classroom, student enrollment, housing, etc.
- Responsible for US and UK Customs processing and issues for visiting professors’ school-related and personal effects.

- Helped Organize London “Thanksgiving” event for Law School and Undergraduate Students.
- London Program – Malibu based Activities, Duties and Responsibilities.
  - Web design and HTML programming for London program (and other international programs) on the Pepperdine University School of Law Website.
  - Drafted student handbook for living abroad, immigration matters, permitted/restricted work under various UK entry categories.
  - Designed and oversaw ad copy for program magazine/web advertising, posters, and recruiting brochures.
  - Direct and Shared responsibility for student registration, curriculum, scheduling, etc.
  - Shared oversight of UK clinicals/internships.
  - Responsible for annual “English Moots” in Malibu with Pepperdine students and English Barristers.
    - Middle Temple and Gray’s Inn.
    - Logistics for visiting bencher, Inn officials and students.
    - Responsible for selecting case to be argued and all supporting materials (coordinated disseminating required information to Inns of Court officials, benchers, faculty judges and student participant and support personnel.
    - Coordinated and hosted events and housing for visiting benchers, Inns of Court officials, and visiting student mooters.
    - Pre-event training how to moot “English Style.”
- International Programs -- ABA Related
  - Primary responsibility for ABA site inspections (2000 and 2007). Responsible for all work and correspondence with the ABA and site inspectors including:
    - Written site inspection reports.
    - Meetings with inspectors in London and follow-up correspondence.
    - Post inspection written reports.
    - Implementation of remedial measures for post site-inspection compliance.

**Addendum II**  
*Significant Law School Service*  
*Director of International (Global) Programs*  
*Robert G. Popovich*

- Annual Reporting Duties – See information under Law School Service, above.

## Addendum III

### **SIGNIFICANT PEPPERDINE UNIVERSITY (CENTRAL ADMINISTRATION) SERVICE**

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- University Retirement Plan Committee – Representative of the Law School. (Invited and selected to serve a three-year term, beginning Spring 2016).
  - The Retirement Plan Committee is responsible for Plan level investment review and monitoring. My recent three-year appointment came at the request of Paul Lasiter, Vice President and Chief Financial Officer, Pepperdine University.
- University Tenure Committee – Representative for the Law School (2015/16).
  - The University Tenure Committee is chaired by the Provost. It reviews the prepared tenure materials to see if all tenure candidates have been treated according to policy. The provost takes the recommendations to the president for discussion and approval/disapproval. Those recommendations approved are presented by the provost to the Academic Affairs Committee (AAC) of the Board of Regents and then later by the chair of the AAC to the full Board.
- ASLC (Advancement of Student Learning Council) – 2010/11. Served as the original Law School Representative for this University-wide committee. It was established in conjunction with University WASC accreditation activities.
  - Council Charter: The Advancement of Student Learning Council (ASLC) exists for the purpose of promoting a culture of outcome-based assessment to enhance student learning. Each member represents a school or major area of the University and has oversight for the following: (a) training faculty and staff in their respective schools or major areas in standard assessment practices; (b) channeling aggregated data aligned to the University's Institutional Educational Objectives to the Office of Institutional Effectiveness and data aligned to the educational objectives of their school and programs to measure school or program level outcomes;(c) facilitating program review and channeling relevant evidence to make data-driven decisions for resource allocation by the UPC, deans, and senior administration; and (d) interacting and serving in partnership with the Office of Institutional Effectiveness.

- Council Collaboration: ASLC is geared towards professional development, while the assurance that educational effectiveness and accreditation standards are met will be coordinated through the University Academic Council (UAC). All proposals for introducing new programs that are submitted to UAC will require a thoughtfully articulated set of student learning outcomes and an assessment plan; all requested changes to currently existing programs will require supportive evidence from the assessment of student learning objectives that documents the need for the change. The ASLC is available to the UAC and the schools and their programs for consultation on the quality of student learning outcomes, assessment plans, and evidence submitted by programs. The intent of this two-prong approach is to facilitate the advancement of a culture of assessment.
- University WASC Accreditation Team – 2010/11. Served as a Law School Representative for University WASC accreditation. Prepared and presented various documents for WASC site inspection. Liaised with site-inspection members and authored follow-up documents and memos pertaining to Law School matters as pertaining to the WASC accreditation process.
- University Academic Council – served as Law School representative for five years. Council responsible for oversight of all academic matters for all schools within Pepperdine University (Undergraduate Seaver College and graduate/professional schools including the School of Law, Graduate School of Education and Psychology, Graziadio School of Business and Management, and the School of Public Policy). The Council's responsibilities include analysis, coordinating, and approving curriculum (and curriculum revisions), programs (and program revisions), certificates and new schools (e.g. School of Public Policy), and other academic matters (including school governance issues). The University Academic Council is chaired by the University Provost, with oversight by the University President. Membership includes the Academic Deans from each of the schools and one faculty representative from each school.
- University Faculty Committee – served as the Law School representative.
- Served as Group Discussion Leader at numerous University retreats and other University functions.
- University Office of Planned Giving. Provided advice and counsel for University planned giving projects including drafting memos, documents and letters related to tax and estate planning pertaining to active and prospective benefactors to the University and Law School.

### **Addendum III**

*Significant Pepperdine University Service*

*Robert G. Popovich*

- University Tax Planning. Provided advice and counsel to University officials in matters relating to University's tax-exempt status, employee benefit programs (e.g., tuition remission, flex spending programs, etc.), and other tax-related matters. Drafted internal memos and documents.
- Provide advice to University colleagues, employees and "friends of the University" on various tax, probate, financial/business, accounting and estate planning matters. Have also prepared and reviewed estate planning documents, tax returns, tax memos, and other related materials for these individuals. This work is always provided without charge.
- A featured faculty member for the "Challenge to Lead" fundraising video.

Thank You!