



Duty Statement

Request for Personnel Action (RPA) Number 2526-00277	Effective Date
Classification Title Attorney IV	Position Number 564-410-5780-016
Working Title Attorney IV	Bureau and Section Legal Division – Technical Resources Bureau

Our mission is to help taxpayers file timely and accurate tax returns and pay the correct amount to fund services important to Californians. To support this mission, FTB employees strive to develop in CalHR's Core Competencies: Collaboration, Communication, Customer Engagement, Digital Fluency, Diversity and Inclusion, Innovative Mindset, Interpersonal Skills, and Resilience. Core competencies are the knowledge, skills, and behaviors which are foundational to all state employees regardless of classification.

General Statement

Under the general direction of the Deputy Chief Counsel, Technical Resources Bureau, the incumbent independently handles complex assignments involving a broad range of tax-related legal matters. Incumbent is responsible for ensuring the technical accuracy and legal consistency in the Legal Division's positions and analyses regarding state and federal legislation, rulings, regulations and for ensuring that the policies articulated in legal advice, rulings, regulations and other internal and external communications are accurate, complete, and consistently in accord with the Board and departmental policy. Further responsibilities include the development, review, and recommendation of a wide variety of complex technical and policy related issues involving the department's overall administration of the state's income tax laws and is responsible for advising on complex statutory and regulatory programs involving an extensive knowledge of federal and state tax law.

Essential Functions

Percentage	Description
45%	Acts as legal support for the legislative program of the Franchise Tax Board; this function includes legal support in the form of drafting of the most complex legislation, review of complex FTB analyses of legislation, and legal support related to FTB legislative proposals, interpretative correspondence and rulings regarding legislative tax matters. This responsibility also includes drafting and review of conformity legislation and reports.
25%	Acts as legal support with respect to legal advice provided by the FTB to internal and external parties and in the form of formal guidance issued by the FTB; this function includes review and approval of all Chief Counsel Rulings, Legal Notices, Legal Rulings, and associated communications with respect to issuance of correspondence regarding controversial, complex, or sensitive tax matters. This responsibility also includes assisting the other divisions within the FTB regarding legal guidance and review of external communications. May act in a lead capacity over administrative staff handling legal guidance matters.
20%	Responsible for Legal Division's review, recommendation, and approval of the most complex or politically sensitive tax law, regulations, and tax policy matters. This responsibility includes, but is not limited to: reviewing staff materials submitted to the three-member Franchise Tax Board for action; technical drafting of correspondence, published rulings, web page materials, policies and regulations; testifying before legislative committees, as may be required; moderating and participating in professional conferences; making presentations to the three-member Franchise Tax Board and to individual Board Members or other public officials in private briefings; participating in implementation of legislation and in departmental tax policy development teams; representing the department at various professional seminars and educational programs as a public speaker on new tax laws and regulations

Percentage	Description
	and providing counsel on issues to Legal Division staff, other department staff, legislative staff, and the staff of other agencies.

Marginal Functions

Percentage	Description
5%	Acts as an advisor or consultant with respect to a wide range of legal matters in connection with Board Member-initiated projects, inquiries, or other special FTB enterprise projects, as directed.
5%	Acts as technical advisor to other Legal Division staff with respect to legal matters in administrative and judicial proceedings.

Signature Authorization

If I choose to sign this form electronically, I agree that my electronic signature is a legally binding equivalent to my handwritten signature on a paper form.

Employee: I confirm that I have read and understand the described duties and functions of this position.

Name (Print)	Signature	Date

Supervisor: I certify that the above information accurately represents the described duties and functions of this position.

Name (Print)	Signature	Date