STATE OF CALIFORNIA
Franchise Tax Board

Proposed

HR Date: 11/02/2026

HR Initials: Tm

Duty Statement

Request for Personnel Action (RPA) Number	Effective Date
2627-01003	
Classification Title	**Position Number**
Attorney IV	564-410-5780-005
Working Title	**Bureau and Section**
Attorney IV	Litigation 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 Assistant Chief Counsel, Litigation Bureau, the incumbent works independently to provide consultative services to the department on the most complex and sensitive legal issues as they relate to policies and practices of various programs of the Franchise Tax Board. The incumbent has substantial involvement in program and policy formulation related to these programs. The incumbent exercises considerable discretion in handling and directing general counsel workloads.

Essential Functions

Percentage	Description
35%	Draft, review, and negotiate contract language for the department with respect to the most complex and sensitive contracts ranging from licensing and data sharing agreements to procurements of integrated tax processing systems and services. Draft, review, and negotiate memoranda of understanding with state and county agencies for services provided to or by the department.
35%	Research the most complex and sensitive legal issues, and provide legal advice and counsel to the Executive Officer and other departmental management and staff with respect to overall departmental policies and practices regarding contracts, including inter agency agreements; confidentiality and disclosure of tax information(including responding to external subpoenas) as allowed or constrained by the Revenue and Taxation Code, the Public Records Act, the Information Practices Act, the Political Reform Act, or other laws; conflicts of interest; power of attorney; data retention; accessibility & reasonable accommodation; and other legal matters. Participate in the development of, and develop, policies related to these programs. Represent the department in the most complex and sensitive controversies, including litigation, or provide support to the Office of the Attorney General or out of state counsel regarding such matters.
25%	Research and make recommendations to departmental management and staff regarding other subject matters of the litigation bureau, including but not limited to bankruptcy, probate, collection, and tax refund litigation issues. Participate in the development of, and develop, policies related to these issues. Independently prepares or assists the department or the Attorney General's office related to all matters falling within Litigation Bureau subject matters. Includes preparing, or assisting in the preparation of, pleadings, discovery, witness testimony, or appellate briefs related to these matters.

Marginal Functions

Percentage	Description
5%	Represent the Department in public forums including the Tax Policy Conferences, the California State Bar, the County Bar, and the Certified Public Accountant (CPA) Liaison Committee meetings, in discussions of matters involving privacy concerns pertaining to taxpayers and the Department.

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

STATE OF CALIFORNIA
Franchise Tax Board

Proposed

HR Date: 11/02/2026

HR Initials: Tm

Duty Statement

Request for Personnel Action (RPA) Number	Effective Date
2627-01003	
Classification Title	**Position Number**
Attorney III	564-410-5795-XXX
Working Title	**Bureau and Section**
General Counsel Attorney	Litigation 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 Assistant Chief Counsel, Litigation Bureau, and the attorney supervisor of the Litigation Unit, the incumbent provides consultative services to the department on legal issues as they relate to policies and practices of various programs of the Franchise Tax Board. The incumbent has involvement in program and policy formulation related to these programs. The incumbent exercises some discretion in handling and directing general counsel workloads.

Essential Functions

Percentage	Description
35%	Draft, review, and negotiate contract language for the department with respect to contracts ranging from licensing and data sharing agreements to procurements of integrated tax processing systems and services. Draft, review, and negotiate memoranda of understanding with state and county agencies for services provided to or by the department.
35%	Research legal issues, and provide legal advice and counsel to the Executive Officer and other departmental management and staff with respect to overall departmental policies and practices regarding contracts, including inter agency agreements; confidentiality and disclosure of tax information(including responding to external subpoenas) as allowed or constrained by the Revenue and Taxation Code, the Public Records Act, the Information Practices Act, the Political Reform Act, or other laws; conflicts of interest; power of attorney; data retention; accessibility & reasonable accommodation; and other legal matters. Participate in the development of policies related to these programs. Represent the department in the controversies, including litigation, or provide support to the Office of the Attorney General or out of state counsel regarding such matters.
25%	Research and make recommendations to departmental management and staff regarding other subject matters of the litigation bureau, including but not limited to bankruptcy, probate, collection, and tax refund litigation issues. Participate in the development of, and develop, policies related to these issues. Independently prepare or assist the department or the Attorney General's office related to all matters falling within Litigation Bureau subject matters. Includes preparing, or assisting in the preparation of, pleadings, discovery, witness testimony, or appellate briefs related to these matters.

Marginal Functions

Percentage	Description
5%	Represent the Department in public forums including the Tax Policy Conference, The California State Bar, the Count Bar, and the Certified Public Accountant (CPA) liaison committee meetings, in discussion of tax law issues.

Signature Authorization

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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