



Katherine E. David | Member

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LICENSURE TX
EDUCATION J.D. Georgetown University Law Center

Clients might say that Katy David can see around corners and predict what's coming next, all in an effort to help them meet their missions. Katy, an experienced and energetic tax lawyer, is gifted at helping her tax-exempt clients feel safe, whether they are confronting challenges or seizing opportunities. Tax-exempt organizations of all sizes rely on Katy to guide them at formation, during their operation and growth, and—when necessary—through wind-down and dissolution. When Katy takes on a new client, she works to truly understand the impact the organization has within its community. From there, Katy is able to help clients plan and implement their strategic direction by combining her technical and legal knowledge with a gut instinct that's been honed over more than 20 years of practice.

Katy's love of tax law began when she was inspired by her tax law professor, the late Martin "Marty" Ginsburg. Professor Ginsburg once said that the most important thing he did was enable his wife, the late Supreme Court Justice Ruth Bader Ginsburg, to do what she did. Katy firmly believes that the most important thing she can do is help her clients achieve greatness by providing them with solid guidance, advocacy, and counsel.

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REPRESENTATIVE EXPERIENCE

Created and obtained I.R.C §501 (c)(3) status for multi-million dollar endowment fund to support a major regional charitable organization

Assisted multiple Texas I.R.C §501 (c)(3) organizations with the formation of supporting organizations, to provide asset protection, enhanced fundraising, and more effective corporate governance

Served as outside general counsel to a Central Texas organization that operates for the support of a regional nonprofit hospital

Advised an organization's executive staff and Board of Directors members regarding structuring and operational issues after the organization experienced a dramatic increase in contributions

Created and obtained I.R.C §501 (c)(3) status for Texas organizations that provide job training and opportunities for individuals with developmental disabilities and other barriers to employment

Advised nonprofit corporations on board and committee structure to encourage the involvement of

outside experts to enhance their missions and governance

Advised numerous tax-exempt organizations about programs created by recently enacted CARES Act and subsequent legislation, and helping Boards of Directors and executive staff determine which opportunities align with long-term strategy and short-term needs

Drafted policies and procedures and provided Board training for multiple nonprofit organizations

WORK EXPERIENCE

2021 Steptoe & Johnson PLLC
2018-2021 Clark Hill PLC
2011-2018 Strasburger & Price, LLP
2003-2011 Oppenheimer, Blend, Harrison and Tate, Inc.

MEMBERSHIPS AND AWARDS

PROFESSIONAL

The Best Lawyers in America®

Texas Rising Stars, Thompson Reuters, 2005-2017

Best Tax Law Attorneys, San Antonio Scene Magazine, 2015

Rising Stars, San Antonio Scene Magazine, 2013, 2014

40 Under 40, San Antonio Business Journal, 2011

Awarded the Nolan Fellowship, American Bar Association Section of Taxation, 2010

Best San Antonio Lawyers Rising Stars, San Antonio Scene Magazine, 2005-2009

INDUSTRY/CIVIC

American Bar Association, Section of Taxation, Council Director (2019-2021), Secretary (2017-2019),
Tax Exempt Organizations Committee Chair, State Bar of Texas Tax Section (2018-Present)

Fellow, American College of Tax Counsel

Board Certified in Tax Law by the Texas Board of Legal Specialization

Sustaining Life Fellow, San Antonio Bar Foundation

Member, The College of the State Bar of Texas

Member, San Antonio Bar Association

Trustee, Saint Mary's Hall (2017-Present)

Member, Catechist, St. Luke's Catholic Church