

James Wolf, CPA

TAX PRINCIPAL

James is a tax principal at Dauby O'Connor & Zaleski, LLC, and has been specializing in the real estate industry since 2009. He has experience in the affordable housing arena, with focuses on properties that utilize Low Income Housing Tax Credits pursuant to IRC Section 42 of the Internal Revenue Code, HUD financing and/or rental assistance, and Rural Economic and Community Development programs. James's portfolio of clients includes not-for-profit corporations, multifamily housing developers, real estate limited partnerships, construction companies and property management organizations, among others.



Education

B.S., Franklin College - Franklin, Indiana

Professional Organizations

- Member, Indiana CPA Society
- Member, American Institute of Certified Public Accountants

Joined DOZ in 2009

Experience Highlights

Since joining this firm, James has prepared and reviewed numerous audits of limited liability companies, corporations, partnerships, and not-for-profit entities owning various real estate developments. These audits have been prepared for HUD, Rural Economic and Community Development, and various debt and equity providers. He has also prepared and reviewed numerous Certificates of Actual Cost for both the contractor and mortgagor as required by HUD, and cost certifications required by various state housing finance agencies for utilization of the LIHTC.

James was a key member of a team at DOZ which developed an equity underwriting model for lower-tier investment properties. This model is currently used by tax credit syndicators, general partners, and developers to create an initial underwriting projection which will be included as part of investment package to be provided to potential investors. James is also the lead for the design and implementation of many of the firm's internal processes and data tracking.

James stays current with the real estate industry and the continually changing regulatory environment by attending continuing education classes and conferences on an ongoing basis.