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HCVT WELCOMES NINE NEW PARTNERS IN 2023

Los Angeles, CA. January 10, 2023 - Holthouse Carlin & Van Trigt LLP (HCVT) partners are pleased to announce that nine professionals have been admitted to the partnership, effective January 1, 2023.

Atikah Bholat, Tax Partner, West Los Angeles, CA

Atikah has over 14 years of experience providing tax consulting, planning, and compliance services to closely held businesses in the manufacturing, retail, distribution, real estate, and professional service industries. She also has extensive experience serving high-net-worth individuals and their related entities and clients in the beauty and wellness industry. In serving her clients, Atikah addresses the tax issues of the business and business owner in an integrated manner to optimize planning opportunities to achieve tax savings. Atikah is a co-chair of the firm's Diversity, Equity, and Inclusion Committee and was named a 2022 *Los Angeles Business Journal* Top 100 Accountant.

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Cameron Burkert, Tax Partner, Fort Worth, TX

Cameron brings over 11 years of experience in public accounting and private industry to his role serving clients in the private equity industry. Cameron has extensive experience in partnership taxation and addresses the US and international tax structuring implications throughout the fund cycle. In addition to serving clients in the private equity industry, Cameron serves high-net-worth individuals and their related entities. Before joining HCVT, Cameron served in various tax roles at a global private equity organization where he was responsible for overseeing both US and international alternative investment tax structuring and individual tax compliance for the firm's founders and executives.

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Michael Duong, Tax Partner, Irvine, CA

Michael provides tax consulting, compliance, and structuring services and specializes in serving clients in the private equity and real estate industry sectors. He serves global private equity organizations with complex asset holdings. Michael assists private equity clients with fund formation, structuring, exit, asset acquisition, and divestiture. He regularly addresses the complexities associated with basis adjustments under Section 743(b) and 734(b), partnership income allocation, maintenance of capital accounts, and waterfall arrangements. Michael advises clients on compliance and reporting matters, including partnership and operating agreements, and cross-border issues, among other industry-specific tax issues. In addition to serving clients in the private equity and real estate industry sectors, Michael provides tax consulting and compliance services to family offices and their related entities.

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Kimberly Hastings, Audit Partner, Encino, CA

Kimberly (Kim) began her career in public accounting at HCVT and has been with the firm for over 17 years. She primarily serves nonprofit organizations that provide life-changing services for children and families through housing, mental health, aging, and substance abuse programs. Within this sector, she works extensively with developers of affordable housing projects funded through tax credit incentives, HHH, and HUD financing. Kim has also developed deep expertise in auditing nonprofit and for-profit organizations funded by federal or state grants. Many of these grants must comply with Single Audit and other reporting requirements, including COVID relief funding through shuttered venue operator grants (entertainment) and provider relief funds (medical). Kim serves as a leader within the HCVT nonprofit niche and is a key member of our Audit Quality Control Committee and National Office. In addition to her daily responsibilities, Kimberly serves on HCVT's Community Service Committee and participates in the Women's Initiative and Mentorship programs. As a Los Angeles native, she is passionate about advocacy and advancement for the underserved in our community, particularly in mental health, education, housing, and employment.

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Cathy Kleineahlbrandt, Tax Partner, Pasadena, CA

Cathy is a highly experienced accounting professional with over 34 years of public accounting experience. She provides comprehensive tax and business management services to high-net-worth individuals, families, and related entities. She focuses on providing solutions that help her clients meet their financial objectives. In serving her high-net-worth clients, she evaluates the tax implications of changes in assets and income, including the impact on the individual, the family, multi-generations, the business, investments, and the estate. More than tax and business management services, Cathy provides guidance and insight to help her clients protect their assets and preserve wealth. Cathy also provides tax compliance and accounting services to clients in the entertainment industry. She performs industry-specific services, including accounting for loan-out corporations. These services encompass payroll, tax planning and compliance, and preparation of quarterly income tax estimates.

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Neel Modha, International Tax Partner, Irvine, CA

Neel has over 15 years of experience providing international tax consulting and compliance services, serving clients, including high-net-worth individuals, closely held business entities, and private equity clients across various industries. Neel is experienced in serving US clients with global operations and non-US clients that invest and conduct business in the US. He has extensive experience addressing complex international tax issues, including foreign tax credits, subpart F and PFIC planning, FATCA, FIRPTA, tax treaty analysis, foreign currency calculations, export tax incentives, including IC-DISC structuring opportunities, as well as structuring cross-border investments. Neel also has advised on foreign tax credit planning and compliance, and various international tax compliance requirements, including K-2/K-3 reporting, withholding tax reporting, FATCA and CRS due diligence and reporting, foreign asset disclosure requirements, and reporting of foreign corporations, partnerships, and disregarded entities.

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Kei Morita, Audit Partner, West Los Angeles, CA

Kei began his career in public accounting at HCVT in 2005. He focuses primarily on technology clients, including SaaS, FinTech, and software companies helping to address complex accounting issues such as stock-based compensation, debt and equity transactions, and revenue recognition under ASC 606 relating to software and non-software elements in license and SaaS arrangements. A native Japanese speaker, Kei not only assists in translating audit and tax client matters, he also offers a unique opportunity to help bridge the divide between Japanese technology companies and US accounting and business practices. In addition to technology, Kei has also provided audit and assurance services to closely held private companies, professional service organizations and served clients in the hospitality industry, including hotels and restaurants. His published articles on accounting topics are often cited in other media.

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Jessica Saugstad, Audit Partner, Westlake Village, CA

With over 15 years of public accounting experience, Jessica co-leads the firm's real estate industry practice and is focused exclusively on serving the real estate industry. Her real estate clients include developers, homebuilders, contractors, management companies, real estate service companies, and real estate own-and-operate entities. Her breadth of knowledge and experience extends to all asset classes, from industrial and office to retail and multi-family. She serves clients in the construction and homebuilding space and is also experienced in working with financial service organizations. Jessica also leads the firm's Quality Control team, providing audit oversight and complex accounting guidance. She has extensive experience with topics such as consolidations, investments in joint ventures and undivided interests, business combinations and asset acquisitions, and development-related costs such as incidental revenues, amenities, demolition, interest, and all common transactions encountered in the real estate industry.

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Jessica Schwalb, Tax Partner, West Los Angeles, CA

Jessica provides tax consulting and compliance services to privately held businesses and high-net-worth individuals. She specializes in flow-through entities and has extensive experience addressing complex partnership taxation issues, including allocations, tax basis adjustments, debt allocations, and structuring considerations for asset sales. Jessica serves clients primarily in the real estate industry, including owners, developers, operators, investors, and property managers, and has experience with all asset classes, including residential, multi-family, and commercial properties.

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About HCVT

Founded in 1991, HCVT is the 31st largest firm in the United States. We provide tax, accounting, business management, and mergers & acquisition services to private companies, closely held businesses, public companies and high-net-worth individuals and family offices. We provide audit and assurance services to privately held businesses, and employee benefit plan sponsors. HCVT is known in the marketplace as a firm with deep technical skills addressing the most complex tax issues associated with partnerships and pass-through entities. Today, we are the sixth largest CPA firm in Los Angeles with a team of nearly 800 members, including over 100 partners and principals. We serve our clients from nine offices in Southern California; Northern California; Fort Worth, Texas; Park City, Utah and Phoenix, Arizona. Our national and global reach is extended by our affiliation with Moore North America, Inc. (MNA), a member of Moore Global Network Limited, an independent and global accountancy and business advisory network of CPA and financial services firms throughout the United States and around the globe. To learn more about HCVT, visit us at www.hcv.com.