



Brian E. Lo

PRINCIPAL

Brian.Lo@hcv.com

t. 817.768.6028

OFFICE

18565 Jamboree Road
4th Floor
Irvine, CA 92612

PRACTICE AREA & SPECIALIZATION

Treehouse: Partnership
Tax Compliance &
Reporting

INDUSTRIES SERVED

Private Equity &
Investment Advisory

EDUCATION

BS, Business
Administration,
Accounting, Cal Poly
Pomona

Brian is a tax principal and has over 20 years of technology and business process improvement consulting experience primarily serving the private equity and investment management industry sector. His solutions are tailored to the needs of his clients and include partnership accounting, compliance and reporting solutions, expense management and treasury and cash management. He provides solutions that assist private equity organizations to improve accounting and general ledger processes, gain value from software and provide reporting packages specific to the industry. His experience includes addressing the reporting and compliance requirements of the entire spectrum of the fund cycle including fund entities, management companies, general partner promote vehicles, executive co-investment vehicles, and portfolio companies.

Brian's consulting, and implementation services include addressing deal lifecycle, partner income allocation, carried interest, distribution models and complex waterfall arrangements. Brian's project experience is comprehensive and involves the development of strategic and operating plans for information systems, establishing business intelligence solutions and implementing and integrating Cloud/SaaS models. He has broad experience developing process models that focus on improving operational capabilities and efficiencies. His experience includes working with all major third-party vendor applications including SAP/R3, Oracle/Hyperion, Unit4/Coda Financials, Sungard/Investran, Workday, among others.

Brian's career is a mix of both private industry and public accounting experience. Most recently, Brian was with KPMG's Global Tax Technology practice where he focused on implementing technology solutions addressing K1 processes and compliance requirements. Brian's private industry experience includes leadership and architecture positions for two of the largest global private equity organizations. Brian is a graduate of Cal Poly Pomona.