



David Nowak

PRINCIPAL

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PRACTICE AREA & SPECIALIZATION

Tax

Trusts & Estates

INDUSTRIES SERVED

High Net Worth
Individuals and Family
Offices

CREDENTIALS AND CERTIFICATIONS

CPA, California

EDUCATION

MBT, University of
Southern California
BS, Accounting,
California Lutheran
University

David has over 20 years of experience providing tax consulting and compliance services to high net worth individuals, their closely held businesses and their related trusts and exempt organizations. David addresses the needs of the business and business owner in an integrated manner to help ensure that planning opportunities are optimized. He has significant experience in addressing the tax issues associated with S corporations, partnerships, and other pass-through entities. David guides his clients on tax issues relating to charitable giving and gifting. He has assisted his clients with IRS and FTB examination matters.

David began his career in public accounting with Arthur Andersen. He received his bachelor's degree from California Lutheran University and his master's degree in business taxation from the University of Southern California. David is a Certified Public Accountant in California. He is a member of the American Institute of Certified Public Accountants and the California Society of Certified Public Accountants.

Professional and Community Involvement

American Institute of Certified Public Accountants
California Society of Certified Public Accountants