



Stephanie Wilkinson

PARTNER

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OFFICE

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PRACTICE AREA & SPECIALIZATION

Tax

Trusts & Estates

INDUSTRIES SERVED

Nonprofit Organizations

High Net Worth
Individuals and Family
Offices

CREDENTIALS AND CERTIFICATIONS

CPA, California

EDUCATION

MBT, University of
Southern California
BS, Accounting,
California Lutheran
University, *summa cum
laude*

Stephanie has over 14 years of experience providing tax consulting and compliance services to tax-exempt organizations. Stephanie serves a variety of §501 (c) (3) organizations including private foundations and public charities. Stephanie assists her clients to meet their compliance requirements with the goal of helping the organization fulfill their charitable mission and goals. These organizations have a variety of purposes including grant-making, supporting education and industry training, providing food to the homeless, supporting veterans, and protecting animal rights. Stephanie also has experience providing tax compliance and consulting services for high net worth individuals addressing their trust and estate needs, gifting and family investment partnership compliance requirements.

Stephanie has a bachelor's degree in accounting, *summa cum laude*, from California Lutheran University and a master's of business taxation from the University of Southern California. Stephanie is a Certified Public Accountant licensed in the state of California. She 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
The Sam Simon Charitable Foundation, Officer, and Director
The Sam Simon Feeding Families Foundation, Officer, and Director
The Sam Simon Charitable Giving Foundation, Inc., Officer and Director