



Phillip Allred

PARTNER

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OFFICE

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PRACTICE AREA & SPECIALIZATION

Tax

INDUSTRIES SERVED

Private Equity &
Investment Advisory
Real Estate & Hospitality

CREDENTIALS AND CERTIFICATIONS

CPA, California
State Bar of California

EDUCATION

JD, Southwestern Law
School
BA, Business
Administration,
concentration in
Accounting, California
State University,
Fullerton

Phillip has over 18 years of experience providing tax planning and tax compliance services for private equity and real estate investments industry sectors. His principal areas of focus include the regulatory requirements and taxation of real estate investment trusts and of other vehicles that hold residential and commercial mortgages. Phillip consults with clients regarding the business and tax provisions of partnership/operating agreements, and the inbound and outbound tax considerations for various classes of investors. In addition, he assists both private and public companies with mergers and acquisitions, including tax diligence and tax structuring with an emphasis on minimizing income taxes and maximizing utilization of tax attributes.

Phillip began his career in public accounting at Deloitte. He is a graduate of California State University, Fullerton and has a bachelor's degree in accounting, and also holds a JD from Southwestern Law School and is a member of the State Bar of California. Phillip is a Certified Public Accountant in the state of California.

Professional and Community Involvement

California Society of Certified Public Accountants
Cal State Fullerton, Mihaylo College of Business and Economics, Advisory Board