



Anita S. Lee

PRINCIPAL

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PRACTICE AREA & SPECIALIZATION

Tax Planning &
Compliance

INDUSTRIES SERVED

High Net Worth
Individuals and Family
Offices

Professional Services
Firms

Real Estate & Hospitality

CREDENTIALS AND CERTIFICATIONS

CPA, California

EDUCATION

MBT, University of
California, Los Angeles

BA, Economics,
University of California,
Los Angeles

LANGUAGES

Cantonese and

Anita provides over nine years of tax consulting and compliance services. She primarily serves clients in the real estate and professional services industry sectors and provides tax services to both residential and commercial real estate clients. Her experience includes complex partnership allocations, tax basis adjustments, capital account book-up, and debt allocations.

Additionally, Anita assists high-net-worth individuals in achieving their family and business goals. She provides integrated tax planning for their closely held businesses.

Anita received a Master of Business Taxation and her bachelor's degree in business economics from the University of Southern California. Anita is a Certified Public Accountant in the state of California and a member of the American Institute of Certified Public Accountants.

Professional and Community Involvement

American Institute of Certified Public Accountants

Mandarin