



Gina A. Ballard

PARTNER

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OFFICE

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PRACTICE AREA & SPECIALIZATION

California Manufacturing and Research & Development Exemption

Opportunity Zones

Tax Credit & Incentives

Hiring & Equipment Credits

INDUSTRIES SERVED

High Net Worth Individuals and Family Offices

Manufacturing, Retail & Distribution

CREDENTIALS AND CERTIFICATIONS

CPA, California

EDUCATION

MBT, University of Southern California
BSBA, concentration in Accounting, Cal Poly San

Gina has over 20 years of experience providing tax compliance and planning services to closely-held companies and their owners. Her industry experience includes serving clients in the manufacturing and distribution industries. She has served clients in all phases of the business cycle ranging from start-up, rapid growth to mature companies, and business owners seeking exit strategies and other liquidity events. Gina has extensive experience in tax planning for individuals, as well as for corporate and partnership clients. She assists clients with buy/sell issues, multi-state tax minimization strategies, individual trust, and estate tax planning and representing clients before federal and state taxing authorities. Gina has experience assisting clients to gain access to various tax incentive credits, including State and Federal Location-based Incentive Credits (LBIC's), Federal Empowerment, and Opportunity Zone Credits, among others. In addition to her experience in public accounting, Gina spent several years in the private industry serving as a tax manager at a public company. This industry experience, coupled with her consulting experience, allows Gina to provide a balanced perspective to her clients.

Gina has a Master of Business Taxation from the University of Southern California and a bachelor's degree in business administration from California Polytechnic State University, San Luis Obispo. Gina began her career in public accounting at Deloitte. She was recently honored as the first woman to receive the CalCPA Public Service Award in recognition of and appreciation for long-term public service. She also serves on several boards in her community.

Professional and Community Involvement

American Institute of Certified Public Accountants

California Society of Certified Public Accountants

Cal Poly San Luis Obispo School of Business Alumni Association, member

University of Southern California Alumni Association, member

Bishop Montgomery High School Alumni Association, member

Zeta Tau Alpha Alumni Association, member

Luis Obispo

Peninsula Education Foundation, member
Long Beach Day Nursery, Board Member