



## Gina A. Ballard

PARTNER

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### OFFICE

100 Oceangate  
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Long Beach, CA 90802

### 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

## Honors & Awards

CalCPA Public Service Award, 2021