



## Julia Chan

PRINCIPAL

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### OFFICE

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### PRACTICE AREA & SPECIALIZATION

Tax

### INDUSTRIES SERVED

Real Estate & Hospitality  
Private Equity &  
Investment Advisory

### CREDENTIALS AND CERTIFICATIONS

CPA, California

### EDUCATION

MBT, University of Southern California  
BS, Business Economics and Communication Studies, minor in Accounting, University of California, Los Angeles

### LANGUAGES

Cantonese

Julia has over ten years of experience providing tax consulting and compliance services to clients, primarily in the private equity and real estate industries. Julia's clients include private equity organizations ranging from new companies in the process of establishing their portfolios to established funds with significant assets throughout the US. Julia regularly assists clients with business and tax issues related to partnership/operating agreements, inbound and outbound tax considerations for various classes of investors, state and local tax issues faced by partnerships, passive activities, net investment income tax, and other complex transactions faced by private equity firms and real estate investors.

Julia co-authored several HCVT Tax Alerts addressing complex tax issues resulting from the passage of the Tax Cuts and Jobs Act, including Qualified Business Income and Specified Service Trade or Business (SSTBs). She holds a Masters of Business Taxation from the University of Southern California and a bachelor's degree in business economics and communication studies with a minor in accounting from the University of California, Los Angeles.

### Professional and Community Involvement

American Institute of Certified Public Accountants  
California Society of Certified Public Accountants