

SUMMARY OF CLIENT SERVICES:

Certified Public Accountant with more than 20 years of accounting experience. Client service areas include:

- Income, tax, estate and financial planning for high-net-worth individuals and multi-generational families with personal and business assets both inside and outside of the U.S.
- Personal philanthropic planning – including major gifts of personal property, real estate and fine art through various charitable vehicles.
- Tax planning and preparation of federal and state tax returns for closely-held corporations and partnerships, multi-faceted public charities and private foundations, private trusts and estates.
- Tax planning and consulting for complex tax and financial transactions for real estate, research, development and production, start-up interests, investment partnerships, professional services and manufacturing.
- Planning and negotiations surrounding mergers and acquisitions of closely-held entities -- both mature business interests and emerging markets/start-up concerns.
- Representation of clients in all stages of the IRS's administrative process and controversy procedure, including representation with the Franchise Tax Board and other state tax jurisdictions.



DAVID M. SACARELOS, CPA

PROFESSIONAL EXPERIENCE:

Partner, Seiler LLP, Certified Public Accountants (1987 to current)

EDUCATION/CERTIFICATION:

CPA, State of California

Masters in Taxation, Golden Gate University (San Francisco, California)

B.S. in Accounting, San Jose State University (San Jose, California)

PROFESSIONAL MEMBERSHIPS:

American Institute of Certified Public Accountants

California State Society of Certified Public Accountants

California Society of CPAs, Peninsula Chapter Silicon Valley

State Bar of California: Associate Member, Taxation Section; Trust and Estate Section

COMMUNITY INVOLVEMENT:

Chair, Planned Giving Committee, Adolescent Counseling Services

Chair, Members Insurance & Benefits Committee, California Society of CPAs

President, Financial Planning Forum, Inc. (Palo Alto, California)

Director, Community School of Music and Arts

Member, Silicon Valley Forum, Business & Industry Committee for the California Society of CPAs

Member, Planned Giving Advisory Committee, The Tech Museum of San Jose

Member, Mid-Peninsula Advisory Board, Presidio Bank

Member, Santa Clara County Estate Planning Council

Member, STEP (Society of Trust and Estate Practitioners) – San Francisco Chapter

Member, Northern California Planned Giving Council