

# TAX DEPARTMENT

## SERVICES\*

- Individual return preparation
- Full suite of business tax returns (corporation, LLC, partnership)
- Tax minimization strategies
- Trust tax returns & adjacent planning
- Prior year review & analysis
- State residency counsel & advice
- Tax payment processing
- Integration of tax & investment process for optimal planning & coordination
- Charitable strategies for maximum tax efficiency



JAY KIM  
**Director**

With years of experience as a Tax Attorney, a Senior Tax Professional with Deloitte & Touche, and a Senior Associate at KMPG, Jay brings his experience with complex tax planning to our family office. He is a Certified Public Accountant and received his Master of Taxation at Depaul University in Chicago, before obtaining his law degree at Loyola Law School.



MENKA SINGH  
**Senior Tax Consultant**

Having worked as a Tax Manager in several accountancy firms, wealth management firms, and family offices, Menka brings twenty years of tax advisory experience to our family office. She received her Masters in Business Taxation from Golden Gate University, is a Certified Public Accountant, and is a Member of the California Society of CPAs and AICPA.



VANESSA MIRANDA  
**Tax Associate**

Vanessa Miranda recently joined The Bahnsen Group as a Tax Planning Associate, having worked in public accounting for the past couple of years. She is a graduate of the University of California, Irvine, where she earned her Bachelor's degree in Business Administration with an emphasis in Accounting.

\*Tax services are for clients of The Bahnsen Group only