

PEGGY A. UGENT

Peggy Ugent functions as the accounting and tax director for all areas of the firm's practice. She provides counsel to firm attorneys on income and transfer tax considerations with regard to proposed business transactions, choice of entity structure, and investment in pass-through entities. In her role as tax director for the firm, Ms. Ugent regularly researches and analyzes complex domestic and international tax issues, facilitates tax reporting and compliance for foreign trusts and domestic entities, and assists in the preparation of estate and gift tax returns. Ms. Ugent has extensive experience in the preparation and examination of all types of federal and state income tax returns, and her previous experience as a partner in a public accounting firm provides a strong background for dealing with the income and transfer tax issues encountered by the firm's clients.

Education

Golden Gate University (M.S., Taxation, 1988)

Eastern Illinois University (B.S., Zoology and Chemistry, 1974)

Professional Affiliations

Certified Public Accountant in Texas and California

American Institute of Certified Public Accountants

Texas Society of Certified Public Accountants

California Society of Certified Accountants

Los Angeles Estate Planning Council

- Past President

South Bay Estate Planning Council

- Past President

Previous Experience

Windes & McClaughry Accountancy Corporation

Director

February 2005 – May 2006

Torrance, California

Timothy Good and Company

Partner

July 1993 - January 2005

Torrance, California

Gary Iskowitz and Company, L.L.P.

Partner

June 1981 – June 1993

Los Angeles, California

Kenneth Leventhal and Company

Staff Accountant

May 1979 – May 1981

Los Angeles, California

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