

Katherine Vander Veen, CPA, CVA

Curriculum Vitae

Experience Eight years of public accounting experience at Soren McAdam LLP. Responsibilities include:

- Federal and state income tax compliance and consulting, ranging from simple to complex multi-state returns, for
 - C corporations,
 - S corporations,
 - Partnerships,
 - Trusts, and
 - Individuals.
- Representation of clients before taxing authorities, including audits and notice responses.
- Financial statement audits, reviews and compilations of companies ranging from \$15M to \$200M in revenue.
- Employee benefit plan compliance audits for plans ranging from 100 to over 1,000 participants.
- Business valuation experience in a variety of industries for the purposes of sale, gift and estate tax, and litigation.

Gained understanding of the business operations and unique tax attributes of a variety of industries including: healthcare providers, manufacturers and distributors, engineering and other professional practices, and agricultural concerns.

Education & Certifications B.A. in Business Administration, Accounting Concentration (2009)
California State University, Fullerton

- Graduated summa cum laude

Master of Business Administration, Accounting Focus (2013)
California State University, San Bernardino

Master of Science in Taxation (2017)
Golden Gate University

Continuing professional education through the California Society of CPAs, National Association of Certified Valuators and Analysts, and Allinial Global Network.

Certified Public Accountant (2011), Certified Valuation Analyst (2015)

Activities Board member of the Inland Empire Chapter of the California Society of CPAs (2014-2019) and co-chair of the Financial Literacy Committee.
CalCPA State Chair of Financial Literacy Committee (2015-2017).
Member of the California Society of CPAs Public Policy Task Force (2013).