Barbara Kogen, CPA, JD

Partner

Audit, Tax & Advisory

Barbara Kogen has comprehensive knowledge, experience and expertise in all phases of taxation, including:

- Business Taxation - Real estate and partnership taxation, corporate taxation, mergers and acquisitions, international taxation, capital recovery, tax-exempt entities, and tax planning for closely held businesses.
- High Net Worth Individuals – Multi-generational planning, divorce taxation and charitable giving.
- Estate, Gift and Trust Taxation - Estate and gift planning including the use of family limited partnerships and specialized trusts such as GRATS, CLTS, CRTS, QPRTS, and IDITS; complex estate and trust income tax returns, estate tax returns and gift tax returns.

Barbara regularly represents clients before the Internal Revenue Service and Franchise Tax Board.

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INDUSTRIES

Real Estate
Nonprofit Organizations

SERVICES

Estate, Gift and Trusts
Tax Planning
Federal, Multi-State and International Tax Compliance
Financial Planning
Strategic Business Planning
Mergers and Acquisitions

EDUCATION

Loyola Law School Los Angeles - J.D.
University of California, Los Angeles - B.A., Political Science

ASSOCIATIONS AND ACTIVITIES

State Bar of California - Delegate
American Institute of Certified Public Accountants (AICPA)
California Society of Certified Public Accountants (CalCPA)
CalCPA Los Angeles Chapter Estate Planning Committee
American Bar Association
ProSystem *Fx* - Former Co-chair of the User Advisory Board
Baker Tilly International - Member of the Taxation Committee
Russell Bedford International - International Board of Directors, Former member
Frequent speaker on various aspects of taxation