

RICHARD Y. RO, CPA

MANAGING DIRECTOR, FAMILY OFFICE



EXPERTISE

Richard is a finance professional with 20 years of experience in accounting, finance, HR, customer experience, IT integration, and Real Estate. He has more than 10 years of experience on executive management teams.

Richard's service areas of expertise include:

- Family Office services
- Financial, IT, or process audit design and execution
- Internal control and design implementation
- Development and execution of budgets and financial forecasts
- Acquisition, development and disposition of real estate
- Startup strategy formation and infrastructure setup/management
- HR, employee benefits, payroll, IT infrastructure, and facilities
- Customer experience/success management and growth
- Private foundation accounting and reporting

PROFESSIONAL EXPERIENCE

- Director of Operations, RepairPal
- VP/ Co-Founder, Reliance Financial
- Mortgage Broker, Manhattan Financial
- Senior Consultant, Fort Point Partners
- Senior Consultant, Ernst & Young

EDUCATION / CERTIFICATIONS

- Bachelor's in Accounting & Finance, University of California, Berkeley Haas School of Business
- Certified Public Accountant, California

Professional Memberships:

- American Institute of Certified Public Accountants
- California State Society of Certified Public Accountants

CONTACT

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