



WILLIAM B. MOLKENBUHR, CPA

TAX PARTNER

EXPERTISE

Bill is a Certified Public Accountant with over 35 years of experience. He is one of our most senior trust and estate practitioners and holds expertise in the following disciplines:

- Tax planning and compliance, with an emphasis on fiduciary income tax, estate and gift transfer tax, and individual income tax
- Development and design of estate plans in order to reduce estate and/or gift tax and maximize family wealth
- Development of family gift giving programs and preparation of applicable federal gift tax returns
- Design and implementation of charitable giving strategies to minimize estate, gift and income tax
- Working with attorneys, executors and beneficiaries to minimize estate tax and income tax
- Preparation of federal estate tax returns (Form 706) and gift tax returns (Form 709)
- Preparation of federal and state fiduciary income tax returns including income tax planning to minimize taxes
- Preparation of federal and state charitable trust information returns

PROFESSIONAL EXPERIENCE

- Peat Marwick Mitchell, Certified Public Accountants

EDUCATION / CERTIFICATIONS

- Bachelor's degree in Accounting, University of San Francisco
- Certified Public Accountant, California

PROFESSIONAL MEMBERSHIPS

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

CONTACT

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