



## Elizabeth S. Sevilla, CLU, ChFC

Tax Partner

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[LinkedIn Profile](#)

Elizabeth has over 25 years of experience. She has spent the vast majority of her career with individual taxation and is a leader in the firm's Trust & Estate Practice. Elizabeth works closely with high-net-worth individuals, owners of closely held real estate and technology companies, and corporate executives and partners of investment banking and venture capital firms.

Elizabeth holds expertise in the following disciplines:

- Domestic and international individual, business, and fiduciary income tax compliance and planning
- Estate, trust, gift, income, and charitable planning
- Estate tax return preparation and post-mortem funding
- Qualified Small Business Stock (QSBS) planning and consulting
- Business succession
- Executive benefit planning
- Life insurance due diligence
- Representation of clients before taxing authorities (IRS, FTB, etc.)

Elizabeth joined Seiler in 2009. Prior to that, she served as a Senior Tax Director for BDO, a Senior Tax Manager for Deloitte, and a Senior Tax Manager for KPMG.

### Education and Certifications

- Bachelor's degree in Economics and Psychology, University of the Philippines
- Chartered Life Underwriter (CLU) and Charter Financial Consultant (ChFC), Bryn Mawr American College
- Enrolled Agent (EA) with the Internal Revenue Service (IRS)

### Professional Affiliations

- American Institute of Certified Public Accountants
- California Society of Certified Public Accountants
- National Association of Enrolled Agents
- Northern California Planned Giving Council
- San Francisco Estate Planning Council
- Society of Financial Service Professionals
- Society of Trust and Estate Practitioners (STEP)

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## Community Involvement and Board Memberships

- Chair, Trust & Estate Committee, California Society of Certified Public Accountants
- Director, Northern California Planned Giving Council
- Chair of Membership Committee, Director, and Treasurer, San Francisco Estate Planning Council
- Co-chair, Professional Advisors Council, San Francisco Foundation
- Member, Program Committee, Silicon Valley Community Foundation

## Media Mentions

- “A Look Ahead: Estate Planners’ Victory Dance Could Be Short-Lived,” TaxNotes.com, December 22, 2021
- “Mark Zuckerberg Sells Stock Every Day as Billionaires Cash Out,” Bloomberg Wealth, December 14, 2021
- “Transformative Tax Proposals in Treasury’s Green Book,” Accounting Today, June 22, 2021
- “Innovating Services, Meeting Needs,” Accounting Today, Top 100 Firms issue, March 31, 2021

## Speaking Engagements

- “Changes in the Philanthropic Landscape.” Morning Plenary Moderator at the Northern California Planned Giving Conference, San Francisco, CA, 2023
- “California Income Taxation of Trusts and Beneficiaries.” Presenter at the Nevada Trust Conference, Las Vegas, NV, 2023
- “Qualified Business Stock (QSBS) from Planning to Trust Administration to Tax Compliance.” Presenter at the Nevada Trust Conference, Las Vegas, NV, 2023
- “Ask The Experts - Split Interest Gifts.” Moderator at the Northern California Planned Giving Conference, San Francisco, CA, 2022
- “10 Commandments in Engaging Senior Donors.” Panel discussion at the Northern California Planned Giving Conference, San Francisco, CA, 2019
- “High Net Worth Tax Panel – Foreign Trust Reporting.” Co-presenter at the HLB North America Tax, Audit, and Advisory Conference, Grand Cayman Island, 2019
- “Ask the Panel of Experts.” Moderator at CalCPA Estate Planning Symposium, San Jose, CA, 2019
- “The Family That Gives Together Gives More: The New Tax Law and Multi-Generational Gift Planning.” Presenter at the Northern California Planned Giving Council’s 2018 Planned Giving Conference, San Francisco, CA, 2018
- “Annual Tax Update: Estate Tax.” Presenter at the Peninsula Estate Planning Council Member Meeting, Foster City, CA, 2018
- “Tax Reform and Donor Engagement: Implications and Opportunities.” Presenter at the Sanford Institute of Philanthropy, Pleasant Hill, CA, 2018
- “Family Offices Best Practices & Tax Reform 2017 Highlights.” Co-Presenter at the Tiger21 Member Meeting, San Francisco, CA, 2018
- “The State of Estate Tax under the Trump Administration.” Presenter at the Bay Area Family Office Forum, Palo Alto, CA, 2017
- “Estate Planning Challenges.” Panelist at the CalCPA Estate Planning Symposium, San Jose, CA, 2017