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 ultra-high-net-worth individuals and multi-generational families, owners of closely held real estate, manufacturing and technology companies, corporate executives, family offices, 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
- Private Foundation and charitable trust planning and tax compliance
- Business succession and 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

- Former Chair, Trust & Estate Committee, California Society of Certified Public Accountants
- Director & Sponsorship Chair, Northern California Planned Giving Council
- Chair of Membership Committee, Director, and Treasurer, San Francisco Estate Planning Council
- Former 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

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