SEILER LLP
CERTIFIED PUBLIC ACCOUNTANTS

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 Trusts & Estates Practice. Over the past 2 decades, Elizabeth has worked closely with high-net-worth individuals, closely-held business owners, corporate executives and partners of investment banking firms and venture capital firms. Elizabeth holds expertise in the following disciplines:

- Individual and fiduciary income tax compliance and planning
- Estate, trust, gift and charitable planning
- Estate tax return preparation and post mortem funding
- Business succession
- Executive benefit planning
- Life insurance due diligence

Elizabeth joined Seiler in 2009, and is a leader in the firm's Trusts & Estates Practice. Prior to that, she served as a Senior Tax Director for BDO Seidman LLP, Senior Tax Manager for Deloitte & Touche, and Senior Tax Manager for KPMG.

Education and Certifications

- Bachelor's degree in Psychology, Bachelor's degree in Economics, 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, Trust & Estate Committee Chair
- 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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Tax Partner

Speaking Engagements

- "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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