



Corey Heldreth, CPA

Tax Principal

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[LinkedIn Profile](#)

Corey is a Certified Public Accountant with over 10 years of experience. He holds expertise in the following disciplines:

- Tax planning and compliance for high-net-worth individuals and multi-generational families, with an emphasis on fiduciary income tax, estate and gift transfer tax, and individual income tax
- Industry expertise with real estate, investment, private equity, and professional services companies
- Business and accounting services, including quarterly tax planning for high-net-worth individuals
- Foreign tax filings, including FBAR, PFIC, BE-15, 5471, 8865, and 1042

Prior to joining Seiler in 2017, Corey served as a Tax Manager at CTC | myCFO, a Tax Manager at Weaver, and a Supervising Senior Tax Associate at HCVT.

Education and Certifications

- Bachelor's degree in Accounting, Saint Mary's College of California
- Certified Public Accountant, California

Professional Affiliations

- California Society of Certified Public Accountants

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