

Brian J. Yagoda

PRINCIPAL | CPA, JD

Brian has over 40 years of tax and financial consulting experience as a CPA and attorney. He advises large family group clients and business clients on tax and financial matters with an emphasis on succession planning, estate planning and fiduciary income taxation. His wide range of tax experience includes private letter rulings, United States Tax Court matters and IRS appellate cases. He has authored tax articles appearing in legal and other professional publications.

Brian's leisure time is devoted to family activities.

Skills/Practices

- Corporate, partnership and individual tax planning
- Tax compliance for high-net-worth individuals, business entities, estates and trusts
- Business succession planning
- Estate planning
- Tax planning for high-net-worth individuals
- Family office services for high-net-worth, multi-generational families

Contact Info

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Education

- Bachelor of Science in Accounting, Michigan State University
- Juris Doctor, Loyola University of Chicago School of Law

Memberships

- Member of the American Institute of Certified Public Accountants
- Member of the Illinois CPA Society