



Dan Swart, CPA, MST
Tax Director

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Dan's unique background includes over thirty years of diversified public accounting experience advising clients on advanced compliance and planning issues relating to partnership, LLC and S-Corporation taxation. Swart specializes in working with clients in real estate.

Dan recently returned to California from Massachusetts where he worked as a Senior Tax Manager for one of the ten largest CPA firms in the country, CohnReznick. Previously, he was the Principal of Swart & Associates, a public accounting firm in Sacramento which specialized in strategic and innovative tax planning, tax preparation and consulting for nearly three decades.

Dan holds a Master of Science degree in Taxation from Golden Gate University and a Master's degree in Organizational Behavior from California State University in Sacramento. He obtained a double Bachelor of Arts from Bowling Green State University in Psychology and Sociology.

Dan is a Certified Public Accountant. He is a member of the American Institute of CPAs and the California Society of CPAs.

Specializations:

Tax Compliance, Reporting & Planning
Tax Consulting

Industry Expertise:

Real Estate
Trust & Estate

