



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 estate, trust, partnership, LLC and S-Corporation taxation. Dan specializes in helping clients who have trusts, estates, real estate, or operating companies achieve optimal tax and business results.

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

