

# JAYSON M. MORGAN, CPA\*, CGMA, MST

PARTNER ► TAX & BUSINESS SERVICES

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Jayson Morgan is a Tax & Business Services Partner in Costa Mesa, California and serves as partner-in-charge of the Firm's National Service Offering Specialty Groups. He is also the leader of the Firm's National Business Enterprise Tax Services Group (for private entities). Mr. Morgan has over 25 years of experience serving business and individual clients with respect to strategic business planning, transactional assistance, entrepreneurial issues, tax planning and tax compliance. Mr. Morgan is passionate about private businesses and their owners. He has spoken frequently to both internal groups (national and local presentations), and external organizations (Real Estate Conference, Banking Symposium, and Insurance Groups) on business, tax, and planning for private businesses.

Prior to joining Marcum, Mr. Morgan was a Founding Partner of the California firm WilsonMorgan LLP, and served as the Firm's Managing Partner. WilsonMorgan LLP merged with Marcum LLP in July, 2013. Mr. Morgan also has experience from a Big Four accounting firm.

Mr. Morgan is a CPA licensed in the State of California, and holds the CGMA (Chartered Global Management Accountant) designation from the AICPA. Mr. Morgan is also a Life Insurance Agent licensed in the State of California.

## Professional & Civic Affiliations

Member, American Institute of Certified Public Accountants (AICPA),  
CGMA designation

Member, California Society of Certified Public Accountants  
Regional Board Leader, Marcum Foundation

Founding Member, Center for Investment & Wealth Management,  
UC Irvine / Paul Merage School of Busin

## EXPERTISE

- Business Planning
- Tax Compliance
- Succession Planning
- Mergers & Acquisitions

## INDUSTRY FOCUS

- Manufacturing
- Distribution
- Professional Services
- Real Estate/Construction
- Software & Technology
- High Net-Worth Individuals

## EDUCATION

- Master of Science in Business  
Taxation, University of Southern  
California
- Bachelor of Science in  
Accounting, California State  
Polytechnic University Pomona

**MARCUM**  
ACCOUNTANTS ▲ ADVISORS

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\* Licensed by the State of California