

JULIET SONG, CPA*

PARTNER ► TAX & BUSINESS SERVICES



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Juliet Song is Partner-in-Charge of Tax and Business Services in the San Jose office and the regional industry leader for the real estate group. She has 20 years of public and private accounting experience in assisting businesses with their accounting, tax and consulting needs. Ms. Song works with high net worth individuals, closely held businesses and emerging businesses in a variety of industries, including real estate, construction, and professional services. In addition, she has extensive experience assisting clients with their estate planning and trust accounting needs. Ms. Song focuses on integrated tax, transaction and advisory services to owners, builders, lenders, and real estate professionals. She is a regular speaker regarding tax issues impacting the real estate industry.

Additionally, Ms. Song oversees the California Accounting Services Department which provides comprehensive accounting and tax services to closely held businesses and their owners. She also prepares financial statements for clients and financial institutions.

As a member of the National Diversity Equity Inclusion Group, she oversees the Northern California Women's Initiative Program.

Ms. Song also participates in Marcum's technology taskforce, assisting with implementation, strategy and training for software implementation.

Ms. Song joined Marcum in 2016 via the Firm's merger with Lautze & Lautze, CPAs & Financial Advisors, a full-service accounting firm in Northern California.

Professional & Civic Affiliations

American Institute of Certified Public Accountants (AICPA)
California Society of Certified Public Accountants
Happy Hollow Foundation, Board Member and Finance Committee

EXPERTISE

- Estate Planning
- Trust Accounting
- Individual Taxation
- Financial Reporting
- Accounting Services
- Estate & Trust Taxation
- Tax Planning & Compliance

INDUSTRY FOCUS

- Closely Held Corporations & Partnerships
- High Net Worth Individuals
- Real Estate
- Professional Services
- Private Schools

EDUCATION

- Bachelor of Science, Biochemistry
University of California, Los Angeles

MARCUM
ACCOUNTANTS ▲ ADVISORS

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* Licensed by the State of California