

Juliet Song

TAX & BUSINESS SERVICES

Juliet Song joined Marcum in 2016 via the Firm's merger with Lautze & Lautze CPAs & Financial Advisors, a full-service accounting firm in Northern California. Based in the Firm's San Jose office, Ms. Song is a member of Marcum's Tax Department. She has more than 15 years of experience assisting both for-profit and not-for-profit entities with their accounting, tax and consulting needs. Ms. Song works with high net worth individuals and closely held businesses in a variety of industries, including real estate, stock option compensation, construction and professional services. In addition, she has extensive experience assisting clients with their estate planning and trust accounting needs. Her not-for-profit clients include private schools and charitable organizations.

Ms. Song was a leader in Lautze & Lautze's Continuing Education programs, involved in developing training programs and playing a key role on the Mentoring, Recruiting and Marketing teams.

Professional Affiliations

American Institute of Certified Public Accountants (AICPA)
California Society of Certified Public Accountants
Happy Hollow Foundation, board member and finance committee



Juliet Song, CPA*
Partner

SUBJECT MATTER EXPERTISE

Estate Planning
Trust Accounting

PRACTICE FOCUS

Family-Owned Businesses
High Net Worth Individuals
Real Estate
Property Management
Construction
Manufacturing
Professional Services
Private Schools
Private Foundations
Social Service Organizations
Associations
Employee Benefit Plans

EDUCATION

Bachelor of Science,
University of California, Los Angeles



MARCUMGROUP
MEMBER

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