

Anna Su, CPA

Managing Director, Tax

Menlo Park
4200 Bohannon Drive, Suite 250
Menlo Park, California 94025

**Overview**

Anna has over 15 years of experience in tax planning, research and tax compliance. Her experience includes minimizing federal and state tax liabilities, stock option planning, estate planning, preparation of tax projections, analyzing alternatives, identifying and researching complex tax issues, and representing clients before the IRS and Franchise Tax Board. Anna is experienced with individual, trust, estate, nonprofit, corporate and pass-through entities. Her industry focus includes high-net-worth individuals, public charities, private foundations, software, professional services, high-tech, biotech, venture capital, hedge fund and real estate management.

Anna Su holds an active CPA license in California.

Interesting Tidbit

Enjoys adventure travel and manages to get out of the country at least once a year.

Community

- Chapter Director – CalCPA PSV
- Member – ProVisors PA2
- Member – American Institute of Certified Public Accountants (AICPA)
- Member – Ascend

News & Events

Anna Su Elected President of the Peninsula Silicon Valley Chapter of CalCPA
06.11.18

Services

Private Client Services
Stock Option Planning
Tax Planning

Industries

Financial Services
Real Estate
Technology

Education

BS/Business Administration – San Jose
State University