



Olivia (Livi) Lehigh, CPA

Manager, Tax

San Francisco

600 California Street, Suite 600
San Francisco, California 94108

Overview

Livi is a Tax Manager in BPM's San Francisco office and commonly works with high-net-worth individuals to maintain tax compliance and provide other tax planning services. She focuses her practice on minimizing federal and state tax liabilities, income tax projections, stock option planning, planning the sale or acquisition of Qualified Small Business Stock (QSBS), and identifying and researching complex tax issues. Livi's clients include founders and early employees of technology companies, high net-worth individuals, corporate executives, stock option holders and multi-generational family groups.

She recently assisted a client in analyzing their stock option portfolio for implementation of their 10b5-1 plan, including which options would be more advantageous for future charitable giving.

In addition to serving her clients, Livi is passionate about training and serves as the leader of the Private Client Service Training Committee.

Olivia (Livi) Lehigh holds an active CPA license in California.

Interesting Tidbit

Livi spends most of her free time in her extensive vegetable and flower garden, which also includes 15 fruit trees. She utilizes the skills she learned in culinary school to cook, bake and preserve her harvests.

Certifications

Certified Professional Accountant (CPA)

Services

Private Client Services
Stock Option Planning
Tax Planning

Education

BS/Business Administration, Accounting
– San Francisco State University