

# Meredith Johnson, CPA, CFP®

**Director, Tax****San Francisco**

600 California Street, Suite 600  
San Francisco, California 94108

**Overview**

Meredith has deep experience in not only accounting, but financial planning and analysis, project management and business development. She works with clients based on a holistic approach to taxation, in the areas of estate planning and business succession particularly. Meredith excels in coordinating the needs of diverse stakeholders, managing multi-stage projects and synthesizing complex data. Her specialties include Financial Planning, Tax Planning and Compliance, Project Management, Business Strategy, Financial Modeling and Analysis, Employee Training and Development and Public Policy Analysis and Advocacy.

Meredith Johnson holds an active CPA license in California.

**Industries**

Financial Services  
Technology

**Education**

BA/Politics and Asian Studies –  
Whitman College  
MS/Taxation – Golden Gate University

**Community**

- Board Member – California Society of CPAs (CalCPA)
- First Vice President, CalCPA San Francisco Chapter
- Manager – One Brick
- Site Manager, Volunteer, Financial Coach – Tax-Aid
- Pro Bono Committee, Financial Planning Day Steering Committee – Financial Planning Association
- Treasurer – Golden Gate Running Club

**Certifications**

- Leadership San Francisco Alumnus, 2017
- CalCPA Leadership Institute Alumnus, 2017

**News & Events**

California's Proposed Wealth Tax's Impacts on High-Net-Worth Residents 01.27.21

BPM Agribusiness Leaders Discuss New Relief Options for Grape Growers  
Larry Solari and Meredith Johnson Featured on WineBusiness.com 11.11.20

How to Get Your Business's Fair Share of U.S.D.A. Relief Payments 10.30.20

Times are Changing and so Is Leadership 06.11.18

BPM's Meredith Johnson Elected to CalCPA's State Board of Directors 08.04.17