

# Rich McDonnell, CPA

**Partner, Tax**

Private Client Services Co-leader  
Community Outreach Liaison  
Leader

**Menlo Park**

4200 Bohannon Drive, Suite 250  
Menlo Park, California 94025

**Overview**

Rich is a Certified Public Accountant licensed to practice in California and New York. He has over thirty years of experience; the first twenty years were with PricewaterhouseCoopers LLP. Rich focuses his practice on tax planning and income tax preparation for individuals. His experience includes minimizing federal and state tax liabilities, income tax projections and analyzing alternatives, identifying and researching complex tax issues, representing clients before the Internal Revenue Service and Franchise Tax Board.

Additionally, Rich presents seminars to educate employees of companies on tax planning and compliance issues related to qualified small business stock (QSBS), stock options and the effect of ISO's on alternative minimum tax. Current clients include founders and early employees of technology companies, high-net-worth individuals, corporate executives, stock option holders, venture capitalists and retirees.

Rich McDonnell holds an active CPA license in California, New Jersey and New York.

**Interesting Tidbit**

Rich lived and worked in Japan from 1995 to 2000; played Lacrosse in college; scuba dives in places such as Micronesia for Wreck dives, the Great Barrier Reef, the Bahamas for Shark dives, and any other warm water diving he can find. Most importantly, he is the proud Dad of his two growing boys and the Community Outreach Liaison Leader for the Firm.

**Community**

- Board Member, Officer/Past President 2015/2016, ABC Mixer Chair - CalCPA Peninsula Silicon Valley Chapter
- Member - Holy Family School Financial Counsel
- Past Chair, Current Committee Member - BSA Holy Family Pack 286 Leadership Committee
- Member – Community Leadership San Jose
- Member – American Institute of Certified Public Accountants (AICPA)
- Member – California, New York and New Jersey Societies of CPAs
- Past Member – Palo Alto Business Forum
- Past Board Member – Big Brothers/Big Sisters of Bergen County, New Jersey

**Services**

Estates, Gifts & Trusts  
Private Client Services

**Industries**

Technology

**Education**

BBA/Public Accounting - Pace  
University, Westchester, New York

## News & Events

2020 Estate and Income Tax Planning Opportunities  
Plan Now, As Rules May Change Next Year 08.27.20

CARES Act Offers Significant Tax Relief for Individuals and Businesses 03.30.20

Federal Tax Return Filing Deadline Moved to July 15, 2020 03.20.20

Tax Payment Due Dates – Updated Information as of March 19, 2020 03.19.20

Trustees and Beneficiaries Can Save Taxes with the "65-Day Rule" 01.27.20

Do You Need to File Forms 1099-MISC for Your Trade or Business by the January 31, 2020 Deadline? 01.13.20

Benefits of Donating to Charities by Making Qualified Charitable Distributions 12.19.19

Do Your Tax Strategies Need a Refresh? 11.25.19

IRS Is Warning Taxpayers That Impersonating Phone Scams Are Increasing as Filing Deadline Nears 03.19.19

Trustees and Beneficiaries Can Save Taxes with the "65-Day Rule" 02.12.19

Tax Dates to Remember 01.16.19

Learn How the TCJA Will Affect Your Taxes With Our 2018 – 2019 Tax Planning Guide 11.20.18

IRS limits tax benefit for charitable contributions to state funds 09.06.18

Trustees and Beneficiaries Can Save Taxes with the "65-Day Rule" 03.02.18

Tax Cuts and Jobs Act  
Key Implications for Individuals 12.22.17

New Discount Restrictions on Family Wealth Transfers 08.24.16

Franchise Tax Board Investigating Issues with 2015 Tax Notices 06.14.16

Minimum Wage Changes Effective July 1, 2016 06.07.16

PATH Act Provides for 2015 and Beyond 12.29.15