

# Sandy Murray, CPA

**Partner, Tax**

Private Client Services Co-leader

415-288-6223

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**San Francisco**600 California Street, Suite 600  
San Francisco, California 94108**Overview**

Sandy has over twenty-five years of experience in tax return preparation, planning, and research. His experience includes maximizing net worth and minimizing taxes, planning regarding the exercise of Incentive Stock Options (ISO's); planning the sale or acquisition of Qualified Small Business Stock (QSBS) and the treatment of losses from Sec 1244 stock, assessing the tax implications of proposed transactions, preparing tax projections, and identifying and researching complex tax issues. Sandy's practice is concentrated on assisting ultra-high net worth families with yearly income tax planning and life-long estate planning. He has represented a variety of industries including financial services, professional services, high tech, and real estate in the form of sole proprietorships, partnerships, corporations, and LLCs.

Sandy Murray holds an active CPA license in California.

**Interesting Tidbit**

Second place finish for male team in the 2003 Marin Adventure Race Triathlon and back to back 2nd place finish in the 2009 and 2010 Napa Valley Triathlon. Annual Participant in the 2004 to 2009 Escape from the Rock Triathlon, and the 2005 & 2006 (and return 2014) Escape from Alcatraz Triathlon. Annual Participant in the Dipsea Race, the oldest trail run in the country.

**Professional Affiliations**

- Member – Taxation Committee, CalCPA, San Francisco Chapter
- Member – American Institute of Certified Public Accountants (AICPA)
- Member – California Society of CPAs (CalCPA)

**Community Affiliations**

- Past Board of Directors – Mill Valley Soccer Club
- Board of Directors – Homeowners Association, Strawberry Vista
- Past Member – Tamalpais High School Drug and Alcohol Task Force
- Past Treasurer – Marin FC Alliance

**Certification**

- Certified Public Accountant (CPA)

**News & Events**

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

**Services**Estates, Gifts & Trusts  
Private Client Services**Industries**

Financial Services

**Education**BA/Business Economics/Accounting –  
University of California, Santa Barbara  
Graduate of Leadership San Francisco

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Benefits of Donating to Charities by Making Qualified Charitable Distributions 12.19.19

Do Your Tax Strategies Need a Refresh? 11.25.19

Why Your 2018 Tax Bill Went Up — or Down 04.13.19

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

PATH Act Provides for 2015 and Beyond 12.29.15

Senate Bill 459 Penalizes Employers for Misclassifying Independent Contractors 01.23.12

New Health Care Legislation Signed into Law 03.30.10

Haitian Relief Contributions Now Tax-Deductible 01.26.10