

Tamara McInerney, CPA

Partner, Tax

Partner in Charge, Menlo Park

Menlo Park

4200 Bohannon Drive, Suite 250
Menlo Park, California 94025

**Overview**

Tamara has over 25 years of experience in providing accounting and tax services to closely-held businesses, private client services, trusts and nonprofit organizations. Her income tax services include tax planning and compliance for individuals, partnerships, LLC's, trusts, corporations and non-profit entities. She is experienced in creating strategies to minimize tax liabilities, stock option planning, preparing income tax projections, identifying and researching complex tax issues for individuals and small businesses. Tamara specializes in trust and estate taxation, nonprofits, and in providing income and estate planning to private clients and closely-held businesses. She also has extensive experience working with charitable remainder trusts and private foundations.

Tamara McInerney holds an active CPA license in California.

Interesting Tidbit

She volunteered on several "medical missions," and travelled with a group of Ophthalmologists who provided eyeglasses and eye surgery to residents in Mombasa, Kenya and Mexico.

Community

- Member – American Institute of Certified Public Accountants (AICPA)
- Member – California Society of CPAs (CalCPA)
- Board Member/Treasurer – Science is Elementary
- Past Board Member/Treasurer – Palo Alto Community Child Care

Certifications

- Certified Public Accountant (CPA)
- Certificate in Estate planning - California CPA Education Foundation

News & Events

The 7 Tax Issues To Avoid in a Private Foundation 03.02.21

Nonprofit Education Series Webinar: Accounting and Tax Update 07.23.20

BPM's NonProfit Pro Article Provides CARES Act Guidance 05.01.20

CARES Act Relief for Nonprofit Organizations 04.16.20

Nonprofit Community May Be Impacted By 2020 Appropriations Act 01.07.20

Services

Estates, Gifts & Trusts
Private Client Services

Industries

Nonprofit

Education

BS/Accounting, Minor in Psychology –
Cal Poly, San Luis Obispo



BPM's Nonprofit Education Series: Nonprofit Accounting and Tax Update 07.18.19

AICPA Not-for-Profit Industry Conference 06.10.19

IRS Issues Interim Guidance on Employee Parking and Unrelated Business Income Tax 12.13.18

Nonprofit Education Series: Recent Tax Reform Changes for Nonprofits 07.19.18