



Peggy Ugent

Curriculum Vitae

Peggy Ugent leads the firm's tax compliance practice. She provides counsel to firm attorneys on income and transfer tax considerations with regard to proposed business transactions, choice of entity structure, and investment in pass-through entities. In her role as tax director for the firm, Ms. Ugent regularly researches and analyzes complex domestic and international tax issues, facilitates tax reporting and compliance for foreign trusts and domestic entities, and oversees the preparation of income, estate, and gift tax returns. Ms. Ugent has extensive experience in the preparation and examination of all types of federal and state income tax returns, and her previous experience as a partner in a public accounting firm provides a strong background for dealing with the income and transfer tax issues encountered by the firm's clients.

Education

Golden Gate University (M.S., Taxation, 1988)

Eastern Illinois University (B.S.)

Professional Affiliations and Honors

Certified Public Accountant in Texas and California

American Institute of Certified Public Accountants

- *Vice-Chair, Trust, Estate and Gift Tax Technical Resource Panel*
- *Member, Foreign Trust Task Force*
- *Member, Tax Division*

Texas Society of Certified Public Accountants

Estate Planning Council of Central Texas

Los Angeles Estate Planning Council

- *Past President*

South Bay Estate Planning Council

- *Past President*

Previous Experience

Windes & McClaughry Accountancy Corporation (Torrance, California)

- *Director (February 2005 through May 2006)*

Timothy Good and Company (Torrance, California)

- *Partner (July 1993 through January 2005)*

Gary Iskowitz and Company, L.L.P. (Los Angeles, California)

- *Partner (June 1981 through June 1993)*

Kenneth Leventhal and Company (Los Angeles, California)

- *Staff Accountant (May 1979 through May 1981)*

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