



## Resident Office

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# Donita M. Joseph, CPA, MBT

Partner, Tax

## Range of Experience

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Donita has more than 30 years of experience in taxation issues involving estate and trust tax planning and is responsible for the firm's Estate & Trust practice. As a partner in the firm's Tax department, she also services the needs of privately held companies and individuals.

Donita's expertise includes preparation of estate tax, gift tax, and fiduciary income tax returns, estate planning, postmortem planning, charitable trust planning and compliance, trust and estate administration, trust and estate accounting, and income tax planning for individuals.

Donita also has extensive experience with compliance, planning, and governance issues of nonprofit organizations, including private foundations, and leads the firm's nonprofit organization tax practice group.

## Education

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Bachelor of Science, Business Administration, Accounting  
*Rockhurst College, Kansas City, Missouri*

Master of Business Taxation  
*University of Southern California (USC)*

## Community and Professional Affiliations

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- American Institute of Certified Public Accountants (AICPA), *Member*
- AICPA Trust, Estate & Gift Technical Resource Panel, *Past Member*
- California Society of Certified Public Accountants, *Former Chair of the Estate Planning Committee (2009-2012)*
- California Society of Certified Public Accountants, *Member*
- Camp Fire USA of Long Beach, *Former Board President*
- Long Beach Community Foundation, *Trustee, CFO*
- Long Beach Museum of Art, *Trustee*