

Thomas F. Monaghan, CPA, MST, TEP, CPBC

Partner, Tax



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Range of Experience

Tom has 40 years of experience in public accounting and is a partner in the firm's Tax department. Tom has served as a partner for most of his 40 years in the accounting profession. In 1999, Tom joined the partnership team of Allen, Haight, & Monaghan LLP, which merged with Windes in 2018.

Tom utilizes his extensive and varied experiences in the areas of accounting, taxation, and business consulting to advise middle market entrepreneurial businesses, wealthy families, family offices, and high-net-worth individuals. Tom's unique brand of personalized service is designed to assist clients in monetizing their business and financial assets while minimizing income and wealth transfer taxes. This process allows clients to maximize and preserve their wealth, thereby enabling them to focus on matters of importance to their family, faith, and community.

Throughout his career, Tom has focused on serving clients in the construction, real estate, manufacturing, and professional services sectors. Tom offers his value-added expertise to closely held businesses, wealthy families, family offices, and high-net-worth individual clients seeking a trusted advisor who also serves with integrity and transparency as a life transition coach and mentor.

Education

Bachelor of Science, Accounting
Saint Ambrose University

Master of Science, Taxation
Golden Gate University

"Trust and Estate Practitioner" Designation
The Society of Trust and Estate Practitioners

"Certified Professional Business Coach" Designation
The Professional Business Coaches Alliance

Community and Professional Affiliations

- American Institute of Certified Public Accountants, *Member*
- California Society of Certified Public Accountants, *Member*
- Orange County Business Group, *Co-Founder*
- Professional Business Coaches Alliance, *Member*
- Society of Trust and Estate Practitioners, *Member and Former Board of Directors, Orange County Chapter*
- Tax Twenty (national panel of leading tax consultants), *Member*