



Senior Tax Manager

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Credential

CPA - California

Education

Wesleyan University
(B.A. 1979)

University of California
Berkeley
(MBA 1985)

Golden Gate University
(MS Taxation 1994)

Marcia DeForest

Marcia DeForest has over 20 years of broad tax experience, primarily focusing on international tax issues affecting entities and individuals. She joined Rowbotham & Co. LLP in March, 2008. At the corporate level, she has specialized in the following types of issues:

- Transfer pricing for a publicly traded firm in the wireless industry
- Setting up new entities for biotech and retail firms
- Choice of form and location for a firm in the airline industry
- Partnership and LLC planning for a firm in the software industry
- Withholding tax issues for firms in the financial industry

She has also focused on planning issues facing non-US individuals such as:

- Dual status tax returns
- Tax planning for entrepreneurs
- Tax audits of individuals

She is active in the California Society of CPA's, the Financial Women's Association of San Francisco, and the Association for Accounting Marketing.

Ms. DeForest has experience in both public accounting and private industry. She started her career in public accounting at Price Waterhouse. Prior to joining Rowbotham & Co. she specialized in tax issues affecting publicly traded multinational corporations, including Bank of America, McKesson Corporation, Vodafone, Wells Fargo and Homestake Mining Company. She was a Senior Tax Manager at McKesson Corporation. She has been responsible for the following:

- Transfer pricing documentation and implementation. She implemented transfer pricing studies for McKesson and Homestake Mining Company;
- Corporate audits. She managed the audit department for Vodafone through three federal and numerous state audits;
- Financial statement reporting for Vodafone involving FAS 109;
- Earnings and profits studies and distribution planning for Bank of America;
- Foreign tax credit studies for Bank of America;
- Financial products issues. She managed the international audit of financial products at Bank of America

While at Berkeley, Ms. DeForest was president and founder of the Management Information Systems Organization. She was recognized as the Outstanding Student in her graduating class at Golden Gate University. Ms. DeForest was a recipient of the Bank of America Excellence in Finance Award.