RINA Accountants & Advisors Strengthens its Trust & Estate Tax Planning Expertise with Industry Expert David Boekeloo

David Boekeloo joins the firm as the Director, Trust & Estate Services


David Boekeloo, RINA - Director, Trust & Estate Services

NORTHERN CALIFORNIA, CALIFORNIA, USA, June 30, 2021 /EINPresswire.com/ -- Accounting, Advisory and Wealth Management firm RINA Accountants & Advisors has boosted the firm's Trust & Estate practice with the addition of industry expert David Boekeloo who joins the firm as the Director, Trust & Estate Services.

Mr. Boekeloo has provided tax and legal consulting services to independent financial advisors, Certified Public Accountants, various financial institutions, and attorneys for over 20 years. His expertise is in estate and income tax planning with a focus on:
• Estate and income tax planning for high net worth and ultra-high net worth individuals
• Business succession planning for owners of closely held businesses
• Asset Protection planning for high-net worth and ultra-high-net worth individuals and their beneficiaries
• Advanced trust and fiduciary planning strategies

In addition, he provides innovative estate planning services to high-net-worth individuals and business consulting planning to owners of closely held businesses, including financial advisory practices.

"David is an encyclopedia of financial planning knowledge and truly a subject matter expert in a wide range of taxation and estate planning areas", said Tom Neff, Managing Partner at RINA. "His addition to the team will allow us to expand our ability to deliver an integrated approach to our clients involving income tax, wealth management and estate planning to our clients. David has a unique ability to design creative and comprehensive solutions to complex estate planning and business planning issues in a way that serves the best interest of the client both short and long term. We look forward to introducing him to our clients."

Mr. Boekeloo has a law degree (JD), a Master's in Taxation (MST), is a Certified Financial Planner professional (CFP), a Chartered Life Underwriter (CLU), a Chartered Financial Consultant (ChFC), and an Accredited Estate Planner (AEP). He has written several scholarly articles on various tax and estate planning subjects, and speaks widely at legal, tax, and industry conferences.

He will be working closely with the Tax Department and RINA Wealth Management Services to provide services that address the financial complexities facing businesses and individuals today.

About RINA Accountants & Advisors
RINA Accountants & Advisors is a premier Northern California accounting, advisory and wealth management firm dedicated to helping entrepreneurs, family-owned companies and high net worth individuals achieve their goals. RINA offers industry-focused practices with specialized expertise in real estate, international tax, and not-for-profit organizations. RINA is devoted to serving our clients. Its professionals live the firm's motto: "Your Future is Our Focus".

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