



Carol Fan, CPA

Senior Tax Manager

“Trust is the key element of a successful long-term client relationship.”

I joined Johanson & Yau in 2019 with over a decade of public accounting experience. My primary areas of expertise focus on tax compliance and planning, accounting advisory services for high-net-worth individuals and families, real estate partnerships, investment funds, start-up companies, and trusts & estates.

I enjoy and thrive working closely with clients and their outside advisors with the common goal of producing positive outcomes. I recognize that trust is built over time, and it is with great enthusiasm that I pursue this goal.

I live in San Jose with my husband and two children. We enjoy camping in the summer and skiing in the winter, traveling and experiencing new cultures.

SERVICES

Business Consulting
Family Office
International Tax
Small Business Accounting
Succession Planning
Tax Authority Examinations
Tax Planning & Return Preparation

INDUSTRIES

Investment Funds
Professional Services
Real Estate
Technology

LICENSES

Certified Public Accountant (CPA)

PROFESSIONAL MEMBERSHIPS

American Institute of Certified Public Accountants (AICPA)
California Society of Certified Public Accountants (CalCPA)

EDUCATION

Master of Accounting, Golden Gate University