

# Kim Spaulding

CPA | Shareholder



Kim joined Perkins & Co in 2016 as a senior manager and has over 23 years of tax planning and compliance services. Kim focuses on serving high net worth individuals and closely held businesses and their owners.

A leader in our Legacy Planning Practice Group, Kim is adept at helping her clients grow and protect their wealth through strategic tax planning. Under her guidance, Kim's clients minimize income and estate tax using a variety of techniques, including gifting, charitable and other types of trusts as well as entity planning.

Kim is an excellent listener and a great communicator. She takes the time to understand her clients' personal and family goals, and devises lifetime gifting strategies that reflect their values and protect their assets for future generations.

## EDUCATION

Bachelor of Science in Business, Accounting  
Oregon State University

## PROFESSIONAL & CIVIC AFFILIATIONS

American Institute of Certified Public Accountants

Oregon Society of Certified Public Accountants

Past Chair

Member of Taxation & Legislative Analysis Committee

Estate Planning Council of Portland

Board Member

United Way Columbia-Willamette

Board Member

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## CONNECT WITH KIM

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