

# Susan Sterne

CPA | Shareholder



Susan joined Perkins & Co in 1999 and is a tax shareholder who has established a practice in professional services. She grew up in a healthcare environment, with a doctor dad and a healthcare administrator mom. Presently, she works with physicians, medical clinics, attorneys, architects and engineers. Susan also works with manufacturers and retailers including some of the best restaurants in Portland. She also oversees much of the technical and software training for Perkins' employees.

Susan is the go-to for many of her clients when it comes to explaining complex tax and compliance issues to executive leadership. Perhaps this is because of her passion for teaching and extensive experience presenting to groups.

Susan also works closely with her individual clients throughout their professional careers, assisting with planning for college expenses and retirement and working collaboratively with investment advisors, along with doing annual tax planning and compliance.

## EDUCATION

Master of Science in Accounting, Tax  
San Diego State University

Master of Arts, Communication  
UC San Diego

Bachelor of Arts, Theater, German  
Wesleyan University

## PROFESSIONAL & CIVIC AFFILIATIONS

American Institute of Certified Public Accountants

Oregon Society of Certified Public Accountants

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## CONNECT WITH SHAWNA

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