Your service team

Susanne Morrow
Tax Partner, Private Client Services
San Francisco

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Profile:

- Susanne is a tax partner in our San Francisco office and a leader of EY's Private Client Services practice in the West region. She has over 24 years of experience providing tax advisory and compliance services to high net worth individuals, their families and charitable organization as well as entrepreneurs and their companies. Her practice includes advising executives, entrepreneurs, family offices and trustees with respect to individual, closely held business and fiduciary income tax matters and wealth preservation strategies

Relevant experience:

- The industries which Susanne's clients represent include asset management (venture capital, private equity, hedge funds), high-tech, and retail and consumer products. She has a considerable amount of multi-state tax experience as her clients and their companies reside and operate in a variety of states around the country and in Europe

Education and memberships:

- Susanne received a B.S. in Business Administration from the University of California at Berkeley. She is a certified public accountant licensed in the state of California and a member of the California Society of Certified Public Accountants
- Susanne is a member of the American Institute of Certified Public Accountants' Individual Income Taxation Technical Resource Panel. She has received the AICPA's designation of Personal Financial Specialist

Steve Morrill
Senior Tax Manager, Private Client Services
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Profile:

- Steve is a senior tax manager and leads our Salt Lake City office's Private Client Services practice. Steve has 8 years of experience working with entities in the vineyard & winery, technology, distribution, manufacturing, agricultural, and private equity industries which includes serving the families and ownership groups with their individual tax compliance and planning.

Relevant experience:

- Steve assists high net worth individuals and families on their individual tax matters, privately held businesses, and investment portfolios both domestic and international.
- Steve's experience includes partnership and flow-through entity tax matters, multi-state compliance, gift tax, fiduciary, residency matters, and wealth preservation and succession strategies.

Education and memberships:

- Steve received his B.S. and MAcc degrees from Utah State University's Jon M. Huntsman School of Business.
- Steve recently accepted a board position with the Salt Lake Estate Planning Council for 2019 and serves on the finance committee for Make-A-Wish Utah.
- Steve is involved in the Utah Region's Entrepreneur of the Year program assisting program sponsors in the selection and nomination of organizations for the Social Entrepreneur category.
- Steve is a licensed CPA in Utah and California and an active member of the Utah Association of CPAs.