

# Jay Richardson, CPA, CMA, CFM

Partner

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## Stephanie A. Rife

Legal Assistant

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## Law Practice:

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Jay focuses his law practice in the areas of business and transactions, taxation, estate planning, and employee benefit plan consulting. Jay has advised small and medium-sized business owners for more than 28 years and they include service, technology, and manufacturing companies.

Jay is a Certified Public Accountant, Certified Management Accountant, and is certified in Financial Management by the Institute of Management Accountants. Jay is also a member of the American Institute of CPAs and holds a Certified Global Management Accountant designation from the AICPA. He is also past Chair of the OSCP Board of Directors and is a member of council of the AICPA. Due to his extensive accounting background, Jay is able to bring economic and financial perspectives to real world legal problems.

Jay has published numerous articles for the Oregon Society of Certified Public Accountants and the Oregon State Bar.

## INDUSTRIES

Estate Planning

Manufacturing

Professional Services

Trucking and Motor Carrier

## PRACTICE AREAS

Business & Corporate Law

Estate and Trust Planning

Real Estate Law

Taxation

## Education & Bar Admissions:

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Jay attended Willamette Law School where he received his Juris Doctorate degree. He received his Bachelor of Science degree from Brigham Young University.

Jay is admitted to practice in the Oregon State Courts and Washington State Courts.

Personal Financial Specialist Credential, *Association of International Certified Professional Accountants*

- CPAs who earn the AICPA's Personal Financial Specialist (PFS™) credential badge specialize in financial planning with individuals, families, and business owners, through all the ins and outs of life. Badge holders advise and assist clients in planning the areas of their lives, such as taxes, investments, estates, retirement, and insurance. Credential holders commit to continued development in these areas as well as charitable, elder, college/education, and employee benefit planning.

## Professional:

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- Oregon Bar Taxation Section Executive Committee (2021-2022)
- Adjunct Instructor of Business Law at Washington State University - Vancouver
- AICPA Council at Large
- OSCP Professional Conduct Committee - Chair (2020-2022); Vice Chair (2018-2020); Board Advisor (2014-2018)
- OSCPA Legislative Action Committee Board of Trustees - Vice Chair (2021-2022) Chair (2018-2019)
- OSCPA Board of Directors - Past Chair (2018-2019); Chair (2017-2018); Chair Elect (2016-2017); Vice Chair (2015-2016)
- OSCPA Legislative Policy Committee - Chair (2021-2022); Vice Chair (2019-2021)
- OSCPA Taxation Legislative Bill Review/Oversight Subcommittee - Co-Chair
- OSCPA Taxation Strategic Committee - Member
- American Institute of CPAs, and The Institute of Certified Management Accountants - Member

## Personal:

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Jay enjoys playing golf, skiing, racquetball, biking, and running. When not working you can find him spending time with his family travelling to Mexico, and exploring the Mt. Hood Territory.

## Articles

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**“Brawl in the Family – Reducing Family Disputes After the Death of a Parent”**

January 7th, 2021

**“Tales from the Crypt: Startling aspects of the Oregon estate tax” – *The Accountant***

*Co-authored with Deanna Franco*

June/July 2019

**“Bridging the GAAP: Understanding references to Generally Accepted Accounting Principles in business transaction documents” – *The Accountant***

February/March 2019

**Advocacy Appeal for Legislative Action Committee**

December 2018/January 2019

**“I Know the Trust Says ‘Irrevocable,’ But ‘It Ain’t Necessarily So’” – *The Accountant***

October/November 2016

**“It’s in the Details: What You Need to Know Before You Give Advice on the Patient Protection and Affordable Care Act” – *The Accountant***

*With assistance from David Dean*

July/August 2013

**“The ‘Bare Bones’ of Distributions Under Oregon Probate Law and Federal Income Tax Law” – *The Accountant***

*Co-authored with Deanna Franco*

November/December 2012

**“What Oregon Accountants Need to Know NOW about Ballot Measure 37” – *The Accountant***

February 2005

## Presentations

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**“A View from Legislative Policy and Taxation Bill Review Subcommittee & What is the OCPA/LAC?”**

May 2022 – OSCP Strategic Leadership Forum

**“Oregon Legislative Updates”**

December 3rd, 2019 – Jay presented at the OSCP Professional Issues Updates Conference

## Recognition:

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AV Preeminent® Peer Review Rated by Martindale-Hubbell

## Awards:

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*The Best Lawyers in America*, Tax Law (2021, 2022)