



SSF Estate & Trust



E. Patricia (Patty) Chantler
Tax Partner-in-Charge

Patty is Tax Partner-in-Charge with Sensiba San Filippo LLP, and brings over 10 years of public accounting experience and nearly 20 years of experience in the financial services industry.

Patty is a specialist in the areas of individual and family tax planning and the tax structuring of business transitions. In particular, she focuses on estate planning, trust accounting and estate and trust compliance (including decedent estate returns and trust returns, i.e. charitable reminder trusts, grantor trusts, and other simple and complex trust returns). Patty also spends a significant amount of time in tax compliance for non-profit organizations and private foundations. Her exposure to a variety of industries and her background in the financial services industry provide her with broad-based experience in working with companies of all sizes.

Patty leads SSF's Estates and Trusts Group where her tax knowledge and leadership are utilized to bring best practices and consistent quality to the firm's clients.

Patty is a California Certified Public Accountant and has earned her Estate Planning Certificate, issued by the California Certified Public Accountants Foundation. She is a member of the California Society of Certified Public Accountants, and the American Institute of Certified Public Accountants. She is also an active member of several community-based organizations including Rotary International and the Gilroy Chamber of Commerce.

SENSIBA SAN FILIPPO

CERTIFIED PUBLIC ACCOUNTANTS AND BUSINESS ADVISORS

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