

# Jake R. Peters, CPA, MST

## Principal

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Jake is a Principal at SVA Certified Public Accountants. He uses his experience to provide clients with guidance and consulting in areas such as mergers and acquisitions, federal and state income tax planning, debt forgiveness, Roth IRA conversions, energy-efficiency tax incentives, research and development tax credits, and seller-side representation in business transactions.

His experience working with businesses in the professional services, manufacturing and distribution, construction and real estate industries provides the ability to consult with clients in a variety of areas.

Jake helps clients find opportunities for tax savings and other incentives by committing his time spent with clients to understanding their processes and operations and by learning what is most important to them.

Jake's aim is to be a trusted advisor for all aspects of the client's needs. This includes tax structuring and preparation services for not only the business entity but also the individual owner(s) and in many cases their family as well. In addition to client work, Jake spends time researching new and proposed tax law changes and enjoys networking with a variety of professionals in the business world.

Jake is a member of the American Institute of Certified Public Accountants (AICPA) and the Wisconsin Institute of Certified Public Accountants (WICPA).

### Areas of Expertise

- Tax Planning and Compliance
- Business Ownership Transactions
- Multi-State Taxation

### Industries

- Professional Services: Architects, Engineers, Veterinary
- Real Estate
- Construction
- Manufacturing and Distribution

### Credentials

- Certified Public Accountant (CPA)
- Master of Science in Taxation (MST))

### Education

University of Wisconsin—Milwaukee

- Master of Science in Taxation

University of Wisconsin—Madison

- Bachelor of Business Administration