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EDUCATION

- Boston University, BS (Accounting)

AFFILIATIONS

- Institute of Professional Taxation (IPT)

Jackie C. Orea

Managing Director – San Francisco

Jackie Orea has over 25 years of experience in delivering tax services to public and private corporate enterprises. Jackie leads Andersen's NorCal State and Local Tax practice. As a member of Andersen's State and Local Tax group, Jackie specializes in the sales /use tax and credits and incentives area. She has assisted clients with various multi-state sales use tax and property tax issues including audit defense, compliance, restructuring projects and consulting on various transactions.

Jackie manages the tax function for clients without an internal tax department. She has assisted clients in obtaining refunds for a variety of statutory credits aggregating millions of dollars and obtained training grants. While she now focuses primarily on sales /use tax and credits and incentives, Jackie also assists clients on their multistate corporate tax income/franchise tax issues.

Jackie has served a wide variety of clients, including manufacturers, retailers, financial institutions, pharmaceutical companies, Internet service providers, software companies, and entertainment companies.

Before joining Andersen, Jackie had experience with an international professional services firm providing various state and local tax consulting services to multi-state clients. She also held Tax Manager positions at a large financial institution and a leasing company and was a former Sales and Use Tax auditor with the Massachusetts Department of Revenue.

Jackie is a Certified Member of the Institute (CMI) for Professionals in Taxation.