THE PROGRAM - MS TAX

The Master of Science in Taxation (MS Tax) at Cal Poly is a rigorous one-year program that prepares graduates for careers in public accounting, industry and government. Having a master’s degree is an absolute must for anyone seriously considering a successful career in the highly technical area of taxation.

Cal Poly serves as a primary recruiting school for the Big Four public accounting firms, as well as mid-sized and boutique firms -- all of whom eagerly hire our graduates. The placement rate for our program is outstanding. Students graduating from the program also have historically excelled on the CPA examination and in their careers.

The program’s curriculum covers a broad spectrum of taxation from tax research, corporate, partnership, international, state and local to estate and gift. Students enrolled in the program also apply their knowledge in a winter internship where they receive academic credit and put their tax skills to work. They can also participate in the Low Income Taxpayer Clinic to build confidence and career readiness.

The MS Tax students enjoy small class sizes led by nationally recognized accounting scholars committed to the success of the entire cohort. This high-touch environment fosters close connections and a deep understanding of taxation. To help students build real-world experience and make connections, we developed the Graduate Tax Guest Speaker Series. The Speaker Series brings dozens of accounting and industry professionals into the classroom from top companies such as Google, EY, KPMG, PwC, Deloitte, and more. Topics discussed include advanced areas in taxation, ranging from venture capital, private equity and hedge fund partnership allocations and distributions, to the intricacies and complexities of tax provision work.

Upon conclusion of the program, graduates have a comprehensive understanding of the Internal Revenue Code, the Treasury regulations and other authorities that they can apply to various sophisticated transactions. Graduates also have excellent tax research and communication skills, which sets the Cal Poly program apart from others. MS Tax students leave prepared for today’s dynamic, innovative and changing business environment.
I began as a freshman at Cal Poly in mechanical engineering. After a few years and change of heart I switched to accounting and graduated in 2008. I then eagerly enrolled in the MS Tax program. I wanted to apply my analytical and detail-oriented skills to helping future clients navigate the complex tax arena. I started with PwC San Jose in 2009 in the venture capital practice. My graduate studies, ability to research tax matters, communicate findings, exposure to many different areas of tax, and overall gained understanding of tax law provided me a significant leg up in my role at PwC. My peers, leaders and clients all recognized my abilities, sincerity, passion and professionalism. I quickly accelerated up the path to Senior Associate and then to Manager all before my 4th year at PwC. After a successful tenure at PwC I excitedly moved on to join Menlo Ventures as a Tax Manager in 2015. Menlo Ventures, with $4 billion under current management, one of the earliest VCs founded in 1976, provides seed, early state, and growth funding for private start-up companies in various technology industries. By way of much blessing, I married my dream girl in 2011 and had our (first) son in 2014. While not in the office, I enjoy my time laughing with (and at) my wife and son, crossfit, exploring and traveling, learning, anything outdoors, hiking, beach activities, home improvement, grilling, and helping others. I encourage you to reach out to me if you have any questions on my experiences or the program.
**Erinne M. Fuhring**  
PwC State and Local Tax Manager  
erinne.m.fuhring@us.pwc.com

I found my passion for tax during my undergraduate courses at Cal Poly and participation in VITA. As a senior I received a full time offer to join PwC’s San Jose tax practice and it just so happened that the following year the Cal Poly MS Tax program was being offered. In order to obtain a stronger foundation before entering a career in public accounting, I decided to enroll in the MS Tax program and defer my start date at PwC. In short, the program is challenging but extremely rewarding. I learned not only valuable tax technical knowledge but I also developed better communication, research and writing skills. In my experience, the faculty and courses more thoroughly prepared me to succeed in my career in public accounting. Even though I was in the inaugural Cal Poly MS Tax program seven years ago, I still work with and keep in regular contact with many of the friends I made during the program. Over my career and advancement at PwC, I’ve come to appreciate the quality of professionals that continue to come out of the Cal Poly MS Tax program. Please feel free to reach out to me if you have any questions.

**Vedrana Brkic**  
EY Tax Associate  
vedrana.brkic@ey.com

Hi! My name is Vedrana Brkic, and I am currently a tax associate at EY in the Los Angeles office. I am part of the diversified staff group, but currently focus on media and entertainment clients. Most of my work entails dealing with large corporations and partnerships. I help prepare their federal and state tax returns, and also consult the clients on a daily basis about existing and new tax issues. I attended the MS Tax program at Cal Poly, where I was equipped with all of the tools needed to succeed in the corporate world. The curriculum covered a broad array of tax concepts, which really helped steer me in the direction of my interest. I immediately knew that corporations, partnerships and tax research were areas in which I could see myself making a career. Please feel free to contact me if you have any questions!
Hailey Camillone  
Future EY Tax Associate  
hcamillone@gmail.com  

I knew I wanted to pursue a graduate degree after my undergraduate time at Cal Poly, however I was never really sure in which field. I did not start my undergraduate degree wanting to pursue tax. I was officially an agribusiness major. Luckily, accounting was a requirement. I took my first accounting class as a sophomore, and it really sparked my interest. I did not want my accounting education to stop there. I began taking additional accounting courses through the Orfalea College of Business, where I took my first tax class. For me it was the perfect mix of accounting, law, and problem solving that I was looking for in a career. I just started the MS Tax program and am really enjoying it. The classes are stimulating and all the professors are extremely knowledgeable and supportive. I am very glad I chose this path. Two summers ago, I interned at Ernst & Young in San Jose, and it really solidified my interest in tax. After graduation, I will be moving to San Jose to pursue a tax career at EY. Please feel free to contact me with any questions!

Alisha McGoldrick  
Future Grant Thornton Tax Associate  
ammcgoldrick@gmail.com  

I am currently a graduate student in the MS Tax program and loving every minute of it! I am fascinated by the tax law, and I really appreciate the opportunity to form connections with peers as we take every class together.

I decided to pursue accounting after enjoying my financial accounting course freshman year, and was sold on tax as a service line after my first internship. I worked as a tax intern at Deloitte during the summer after my junior year and as a tax intern at Grant Thornton during the summer between my senior year and the graduate program. I served as the Treasurer of CPAC during my undergraduate career, and continue to be very involved in the club as well as the accounting program in the Orfalea College of Business. I am getting married next fall, and I will be headed up to San Francisco after that to begin my full time career at Grant Thornton! Please feel free to reach out to me with any questions, or if you would like to meet up on campus and chat!
Kaela Perrucci Chang
PwC Tax Senior Associate
kaela.perrucci.chang@pwc.com

I first became interested in accounting during my Taxation of Individuals class at Cal Poly with Michelle Bissonnette. After my sophomore year, I attended a leadership program at PwC's San Jose office. This experience sealed the deal for me, and I knew I wanted to have a career in tax! I had my first client service internship with PwC's software and internet group in San Jose the following summer. A lot of the people I worked with did Cal Poly’s MS Tax program, and they couldn’t say enough great things about their experience. I knew I wanted to put off joining the real world just a little bit longer and happily came back down to San Luis Obispo for one final year. I am now a senior associate at PwC San Jose. The majority of my clients are tech companies and venture capital firms. My husband will be attending Cal Poly for the next two years. Lucky for me, I will be able to telecommute from SLO as much as possible. I guess the master’s program wasn’t quite my final year! Please feel free to reach out to me if you have any questions!

Monica Lee
Deloitte Tax Senior Associate
monicalee@deloitte.com

As a California native, I knew I wanted to go to school on the central coast. Cal Poly was the obvious choice. My experience at Cal Poly has been very positive and I am glad I made the decision to attend the master’s program. The professors provided me with a strong foundation in taxation to jumpstart my career. They were very passionate about the program and provided me with the best experience possible. Soon after finishing my master’s degree, I had the opportunity to begin a career in public accounting at Deloitte in their Los Angeles office. I am currently a tax senior in their Private Wealth practice focusing on high net worth individuals, their businesses and succession planning. Looking back over the past few years, I can undeniably say having the master’s degree really propelled my career and afforded me with opportunities that differentiated me from my peers. I hope you enjoy the master’s program and walk out of it with the same feelings I did. Please feel free to reach out to me if you have any questions! Go Mustangs!
Samantha Blonstein  
Grant Thornton Tax Senior Associate  
sclblonstein@gmail.com

I attended Cal Poly for both undergrad and the MS Tax program. I knew I wanted to go into accounting, but it wasn’t until I took my first undergrad tax class that I decided I wanted to work in tax. Cal Poly’s program was great because it taught me important skills that I still use in my job today such as tax research and how to read tax code and regulations. It also provided me a good overview of the major areas of tax: individual, partnership, corporate and international. Today I work as a senior tax associate at Grant Thornton in San Jose. I specialize in corporate tax and mainly work with mid-size tech companies. I also do R&D tax credit studies and ASC 740 provisions. I am a licensed CPA in California. **Feel free to contact me if you have any questions about the MS Tax program or what it’s like to work in public accounting.**

Scott Hoppe  
Hoppe Tax Principal  
scott@hoppetax.com

I believe Cal Poly’s MS Tax program lives up to and exceeds the school’s excellent reputation. The program provides the foundation for you to leave with a competitive advantage as you start full time in public accounting. As an undergraduate student, I interned in the audit practice at EY before ultimately deciding I wanted to pursue tax at PwC in San Francisco. I went from being another auditor with a bachelor’s degree in accounting to an integral team player with the skills to research tax issues unique to our clients, discern the information, and effectively report the findings because of my degree. As my career progressed, I built on the knowledge from Cal Poly’s MS Tax program, public accounting, and industry experience to follow my dreams and open my own CPA practice, Hoppe Tax, which services businesses and individuals. I had high expectations entering the MS Tax program and it delivered from day one and continues to pay dividends as my business grows. **Feel free to contact me with any questions!**
Tyler Willis
Stephen C. Hovey Accountancy
tyler@shoveycpa.com

Cal Poly's MS Tax program was provided as an option to me before starting full time with PwC. It was an option not many of my peers pursued, but it provided me with a foundation that led to my continual success once I started full time with PwC. The technical knowledge and analytical skills I gained during the program were used on a daily basis, and they were not skills that had been taught at the undergraduate level. During my tenure at PwC, I was constantly challenged with new and exciting business issues. I worked with premium winery and vineyard operations in Napa and Sonoma, some of the largest global SEC filing retail and consumer clients, the flood of San Francisco-based technology companies, and even worked with a variety of ultra high net worth individuals and their families. With the ever-changing tax environment, it is impossible to become an expert in all areas, however the foundation of the MS Tax program allows me to quickly adapt and always bring a valuable perspective to my clients. I left PwC in 2015 as an experienced tax manager and now live in SLO and work for a growing practice in Paso Robles. I am still using many of the skills I learned during my time at Cal Poly and am a strong advocate for the program. Let me know if you have any questions about the program!

Stephan Jimenez
Uber Senior Domestic Tax Analyst
stephan.f.jimenez1@gmail.com

I was born in San Francisco and graduated from Cal Poly in 2009 with a business administration degree concentrating in accounting. I graduated from the Cal Poly MS Tax program in 2010 and began my career with PwC in San Francisco. For four years, the state and local tax department exposed me to corporate and partnership income tax compliance and sales and use tax consulting. I leveraged the research and writing skills I learned from the MS Tax program to research multi-state tax issues and document my findings through internal and external memos. In 2015, an opportunity arose to join Uber Technologies and take on a tax role that emphasized my passion for business strategy. I took the job and have been loving it ever since. I play basketball every Saturday morning and like hiking (so much so that I proposed to my fiancée on Mount Bishop). Based on the number of times I’ve reevaluated my career path, I’d like to think I’m not your typical tax accountant. I’m an open book, and am always looking for opportunities to give back, so feel free to reach out with any questions.
I knew accounting was the choice for me from the very first time I attended a CPAC meeting, and I have not skipped a beat since. Then, when I took the Taxation of Individuals class during my undergraduate career, I found my specialization. From that point on, my professional career truly began. Before starting the Cal Poly masters in taxation program, I was a director of social activities for the CPAC executive board where I developed my professional skills immensely and began to create a network of professionals and students. During the internship portion of the master’s program, I interned at Rothstein Kass where I learned about the alternate investments industry, specifically hedge funds. After graduating, I waved good-bye to San Luis Obispo for the last time and headed back to San Francisco, where I am currently a second-year federal tax associate at KPMG. I mostly work on high net worth individuals within alternate investing but I also have experience in hedge funds, private equity, and venture capital.

Please do not hesitate to reach out to me with any questions.
What type of applicant is likely to be admitted to the MS Tax program?
Admissions is competitive. Most applicants hold an undergraduate degree in accounting, though a degree in a related field is acceptable if the applicant has a fundamental understanding of accounting and taxation. Such applicants MUST have four quarter units in federal taxation and eight quarter units in any accounting subject.

Is there a specific order in which I must take classes?
Yes. Because the MS Tax program is a one-year program, the courses are scheduled in a specific order for the entire cohort.
How does the winter internship work?
Students will serve in a full time supervised work experience at either a public accounting firm, an accounting or internal audit department of a private enterprise, or a local, state, or federal government agency. The location of internships depends on where students apply during the fall recruiting season. The intern will receive compensation. Students must conclude their internship and return to Cal Poly for spring quarter.

Is the MS Tax program offered part-time or online?
No. The program is offered full time with classes held at Cal Poly’s campus in San Luis Obispo.

Are international students accepted into the program?
At this time, the MS Tax program is not accepting international students.

Have any additional questions?
Contact us at: accounting@calpoly.edu

APPLY TO MS TAX PROGRAM
Applications for Cal Poly’s MS Tax program are accepted from Oct. 1 to April 1. Apply online at www.cob.calpoly.edu/gradbusiness.
## REQUIRED COURSES

### SUMMER (8 UNITS - LATE AUGUST TO EARLY SEPTEMBER)
- **GSA 546**  Tax Research and Administrative Procedures
- **GSB 529**  Effective Communication Skills for Managers

### FALL (12 TO 16 UNITS)
- **GSA 537**  State and Local Taxation
- **GSA 538**  Current Developments in Taxation
- **GSA 548**  Advanced Individual Taxation and Tax Planning
- **GSA 540**  Taxation of Corporations and Partnerships *
- **GSA 570**  Selected Advanced Topics - Federal Tax Clinic ** (Elective)

### WINTER (9 UNITS)
- **GSA 539**  Clinical Tax Education Internship

### SPRING (16 UNITS)
- **GSA 536**  Taxation of Trusts, Estates & Transfer Taxes
- **GSA 549**  Advanced Taxation of Flow-Through Entities
- **GSA 550**  Advanced Corporation Taxation
- **GSA 551**  International Taxation

* Required for those who have not previously completed BUS 417 (or BUS 414 and 415) at Cal Poly

** Available for those who are not required to take GSA 540 because they have previously completed BUS 417 at Cal Poly
CAL POLY TAX FACTS

Near 100% employment rate

Goal of 200 students hired by accounting firms per year

Big Four preferred recruiting school

Learn by earning winter internship

More than 45 firms recruit Cal Poly students

LITC low income taxpayer clinic opportunities

More than 40 professional industry speakers

High passage rate on CPA exam

Low cost program
LEARN BY DOING

In Action
## What people are saying about MS TAX

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