



TRUSTEE SERVICES

Castellano-Piatt Accounting LLC provides for the financial wellbeing of trust clients with trustee services. The legal entity of a trust requires fiduciary decisions for the purpose of protecting or preserving the trust. Our experienced professionals understand and appreciate the issues involved in each case.

TAX

We provide tax preparation services for our Trust clients. Because families may already have a CPA relationship in place for personal and business tax returns, we are happy to coordinate our Trust services with your CPA. We find a separation of tax responsibilities works for the benefit of our clients, particularly when a trust is involved. Coordination makes for successful planning.

INVESTMENT POLICIES

Our CPA's monitor monthly activity to ensure we meet investment objectives. As Trustees, we work with investment managers at a wide range of firms. We meet regularly with these individuals. The frequency of these meetings ranges from quarterly to annual depending on the size of the investment portfolio. We respect existing investment relationships if they continue to work well for the Trust and its beneficiaries.

BACKGROUND

We began offering ElderCare and Trustee services to provide assurance in a professional, independent and objective manner to third parties (children, family members or other concerned parties) so the needs of the individual they care for are being met.

QUALIFICATIONS

Linda Murphree, CPA, is licensed in the State of New Mexico by the NM Public Accountancy Board, meet professional education requirements including ethics, and obtain our liability insurance (E&O) through the AICPA Professional Liability Insurance Program. We participate in the Peer Review Program which requires an independent review every three years and monitors compliance with applicable accounting and auditing standards. Our firm proudly passed our Peer Review for the three-year period ending December 31, 2019 with no comments.

From our offices in Corrales, NM, we are proud to serve individuals and businesses throughout the greater Albuquerque, Rio Rancho and Santa Fe areas and across the nation.

STAFF

At this time, our staff consists of fifteen professional and administrative individuals to service the needs of our clients. As we grow, we bring in additional qualified professionals who receive oversight from our CPA's.