

Brandon **FERRELL**

Owner and Principal Tax Consultant
PenCoast.com

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With over 19 years of hands-on experience in the tax preparation and financial planning industry, Brandon Ferrell has built a reputation for providing thorough, personalized, and effective tax solutions. As the owner and principal consultant at PenCoast Tax Services, Brandon is committed to helping clients navigate the complexities of tax regulations and optimize their financial strategies.

Professional Journey

Brandon's professional journey began with 13 years of working locally for Clayton Patterson, EA. During this time, he developed an in-depth understanding of tax laws and financial planning through real-world experience. He honed his skills by working directly with a diverse clientele, ranging from individuals to small businesses. This extensive on-the-job training equipped Brandon with practical knowledge and a keen eye for detail, allowing him to identify opportunities and potential issues that others might miss.

Concurrently, Brandon started PenCoast Tax Services in Moss Beach, CA, where he has continued to expand his expertise and client base. After settling in Belmont, CA, he opened a new office in 2023, providing the room to grow by bringing in support while continuing to ensure quality service.

Areas of Expertise

- **Tax Preparation and Planning:** Brandon specializes in both individual and estate tax returns, ensuring compliance while maximizing deductions and credits.
- **Audit Support:** Providing guidance and advocacy for clients undergoing tax audits, drawing from a deep understanding of audit procedures and regulations.
- **Strategic Tax Guidance for Retirement and Investments:** Offering insights on retirement distributions, stock options, and estate considerations—helping clients make informed, tax-smart financial decisions.
- **Back Tax Resolution:** Assisting clients in resolving past tax issues and negotiating with tax authorities to find manageable solutions.

Client-Centered Approach

At PenCoast Tax Services, every client is treated with the utmost respect and care. Brandon believes in building long-term relationships based on trust and transparency. He ensures clients receive the most relevant and effective advice by staying current with the latest tax laws and continuously seeking professional development opportunities.

Personal Commitment

Brandon brings genuine passion and dedication to his work, going beyond the numbers to support his clients' financial well-being. He invests in ongoing education—regularly attending industry workshops and seminars—to stay ahead of changing laws and best practices. This commitment to growth and excellence ensures every client receives thoughtful, up-to-date guidance and attentive service.

Outside of his practice, Brandon is an active community advocate. He is one of the founding board members of CoastPride in Half Moon Bay, CA, a nonprofit dedicated to supporting and uplifting the LGBTQ+ community. His involvement reflects a deep commitment to equity, inclusion, and giving back to the community he serves.

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