

A portrait of Matthew Lundgren, a man with long brown hair and a full beard, smiling. He is wearing a light purple button-down shirt under a grey blazer. The background is a blurred cityscape with hills under a blue sky.

Matthew Lundgren

CPA & Tax Associate
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Matthew Lundgren is a CPA and Tax Associate at Lagerlof, LLP, bringing a decade of experience in tax preparation and advisory services.

Matthew began his career working with high-net-worth individuals, trusts, estates, and business entities, quickly developing a strong foundation in complex tax matters. A significant early milestone was passing all four parts of the CPA exam on his first attempt within four months. Over the years, he has gained diverse experience, including work with professional athletes, and has increasingly focused his practice on trusts and estates. He is passionate about helping clients navigate the tax implications following the loss of a loved one and values the opportunity to ease their burden during challenging times.

Prior to joining Lagerlof, LLP, Matthew served as a Tax Manager at two respected firms, where he prepared and reviewed fiduciary, estate, and gift tax returns, collaborated on best practices for complex trust and estate matters, and trained and mentored junior professionals. He also served as an Accounting Lecturer at CSU San Marcos, incorporating both academic and real-world expertise into his instruction.

He holds a Bachelor's degree in Accounting from California State University San Marcos and an MBA with High Distinction from Colorado Christian University.

PRACTICE AREAS

Corporate & Tax

EDUCATION

California State University San Marcos -
Bachelor's Degree
Colorado Christian University - MBA, High
Distinction

