



Sheryl Peterson, CPA

Of Counsel
Johanson & Yau

Financial Advisor
JY WealthCare, LLC

Review my background on
[FINRA's BrokerCheck](#)

SERVICES

Estate Planning
Family Office
Personal Financial Planning
Small Business Accounting
Tax Authority Examinations
Tax Planning & Return Preparation

INDUSTRIES

Professional Services
Real Estate
Technology

LICENSES

FINRA Series 7 & 66
California Insurance License #0D84349

PROFESSIONAL MEMBERSHIPS

American Institute of Certified Public Accountants (AICPA)
California Society of Certified Public Accountants (CalCPA)
Santa Clara County Estate Planning Council

COMMUNITY INVOLVEMENT

Vistage International
Venture Lab (VLAB), Treasurer and Volunteer
Guadalupe River Park Conservancy, Board Member

"I'm grateful for the opportunity to help your family."

In 1994, I found my second home at Johanson & Yau. As a CPA, I wanted to work with like-minded professionals with a passion toward client's peace of mind using the highest of industry standards. I became a partner in 1998.

I specialize in tax planning and compliance services for individuals, estates and trusts. I also consult on various aspects of tax planning for stock options. My clients are varied and include owners of small corporations, partnerships and start-up companies, charitable trusts and private foundations.

A lifetime Silicon Valley resident, my husband and I live in Morgan Hill. I enjoy the local arts and environment, and love the small wineries of the Santa Cruz Mountains. I give back to the community by representing Johanson & Yau on various boards and act as a resource for the ElderCare Matters® organization.

EDUCATION

Bachelor of Arts – Business Economics, University of California at Santa Barbara
Master of Science – Taxation, Golden Gate University