SKORHEIM Certified Public Accountants

James M. Skorheim

Certified Public Accountant (CPA)
Registered Investment Advisor

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Areas of Expertise:

-Tax and Consulting

-Rental Real Estate

-Real Estate Investments

-Financial Planning

-Retirement Planning

James Skorheim grew up in southern California, working at Skorheim & Associates in varying capacities since grade school. Since earning his CPA license, James has studied tax and financial planning under his father, and company founder, Jim Skorheim. James has since assumed the tax and financial planning side of the practice and enjoys helping clients structure their lives in a tax efficient way and helping them achieve financial freedom in retirement.

James' tax experience ranges from S-Corporations, Partnerships, and Sole Proprietorships, to their individual owners and operators. He enjoys consulting with clients regarding the best ways to structure their lives, businesses, and investments in a holistic approach to maximize tax efficiency. James specializes in the tax relationship between business, investments and their owners in various fields including professional services, online retail and sales, and brick and mortar businesses, but with a heavy emphasis in the area of rental real estate and real estate investments. He provides tax services to owners and operators of commercial, residential, multi-family, long-term, and short-term rental properties. James understands the business of rental real estate, but also knows the importance of, and best strategies for, the investment side of real estate. He is well-versed in 1031 exchanges and strategies for the mitigation of taxes, but also knows how to use these tools for the tax efficient growth of a real estate portfolio. James is also knowledgeable in the best ways to plan for the protection and passing of those investments, businesses, and assets when the need arises.

In addition to his tax expertise, James is a Registered Investment Advisor in the state of California, and offers professional investment advice through his firm Dorman Skorheim Wealth Management, LLC to high net worth individuals, Family Foundations, 401(k) Plans, and trustees of Supplemental Needs Trusts. Again, he is able to look at investments, financial planning, retirement planning, and tax planning with a holistic approach to bring the most important financial pieces of life together.

Areas of Expertise

-Individuals, Partnerships , S-Corporations, and Sole Proprietorships
-Commercial, Long-Term, Multi-Family, and Short-Term Rental Real Estate
-1031 Exchange and Real Estate Investments
-Financial Planning
-Entity Selection and Tax Organizational Structures
-Retirement Planning

Work Experience

Skorheim & Associates, AAC Shareholder, Tax and Financial Planning	2008-Present
Dorman Skorheim Wealth Management, LLC Managing Member, Investment Advisor	2014-Present

Professional Memberships

American Institute of Certified Public Accountants
California Society of Certified Public Accountants

Education

Licensed as a Certified Public Accountant in the State of California	2014
University of Phoenix—earned Bachelor’s degree in business with emphasis on accounting	2008-2010
Santa Ana College—obtained EMT License	2005-2006
Saddleback College	2001-2002
California State University of Fullerton	1999-2001