

Wealth planning

Team profile



Susan P. Rounds

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Susan P. Rounds is a Director in the Wealth Planning Group of Deutsche Bank Wealth Management - Americas.

Based in San Francisco and Los Angeles, Susan specializes in providing services and solutions to elite clientele in the areas of tax and estate planning, business succession, risk management, philanthropy, family governance, intergenerational wealth transfer and legacy planning. In a career spanning 25 years, Susan has advised ultra-high-net-worth individuals, families, and privately-held business owner clients of Big Eight Accounting, global financial institutions and private legal practice.

Susan taught *Federal Estate and Gift Tax* at the University of Georgia School of Law, both *Federal Income Tax* and *Principles of Accounting* at the University of Georgia Terry College of Business, and all sections for the National CPA Examination, including *Financial Reporting*, *Income Tax and Regulatory Reporting*, *Business Law* and *Audit*. She also served as a faculty member for the NYU Summer Institute on Taxation.

As a noted national speaker, author and commentator, her articles have been featured in leading publications such as *Trusts and Estates Magazine*, *The Journal of Practical Estate Planning*, and *The Journal of Private Wealth Management*. From Atlanta to Alaska, Susan makes frequent presentations to individuals, attorneys, CPAs and Estate Planning Councils on the topics of business succession planning, estate planning, philanthropy, and family dynamics. She serves as Editor for *the NAEPC Journal of Estate and Tax Planning* and sits on the Editorial Board for *Opportunity Zone Magazine*, where she has been named as one of the Top 25 Opportunity Zone Influencers.

Susan holds a BBA in Accounting, *cum laude*, from UT El Paso, a Juris Doctor from the University of Georgia, and an LL.M. in Taxation from Emory University School of Law. She passed the comprehensive four-part CPA exam on the first sitting, holds the coveted AEP® (Accredited Estate Planner) designation and is a registered TEP (Trusts and Estates Practitioner) having earned the STEP Advanced Certificate in Cross-Border Estate Planning. Susan also sits on the Board of Directors for the National Association of Estate Planners and Councils.

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