



## PEOPLE

Lana Kadoshnikov, CPA  
*Shareholder*  
*Missoula, MT*



### Areas of Expertise

Estate Planning  
Multi-State Taxation  
Succession Planning  
Tax  
Trustee Services  
Trusts/Estates Taxation


### Professional Memberships

American Institute of CPAs  
Montana State Society of CPAs  
Great Falls Society of CPAs

### Designations and Licensures

Certified Public Accountant – 2008

 (406) 731-5575

 (406) 788-7478

  
lana.kadoshnikov@jccscpa.com

 connect with me

### Education

B.S. in Accounting /  
Accountancy Option 1998  
MBA in Business  
Administration / Finance  
option 2003  
California State University  
– Fresno, California

A native of Russia, Lana immigrated to the United States in her teens prior to the fall of the Soviet Union. Today she is a proud U.S. citizen. Don't be surprised if a conversation about taxation of trusts and estates leads to an inspirational discussion on the opportunities and freedoms we enjoy as Americans and Montanans. Lana has lived in Montana since 2006.

Lana Kadoshnikov makes it a personal goal to know each of her clients' uniqueness. That understanding and building long-term working relationships allow her to offer each client the most effective advice possible.

Lana's passion for working out the best possible solution for each client – and for utilizing the depth of expertise found across the JCCS team – results in her ability to remove any sense of uncertainty from the consulting experience. She strives to provide each client with knowledge and understanding so they can be confident they know what to expect not only at year-end but also looking ahead to the future.

To do all this Lana looks beyond standard tax issues to consider wealth advisement, retirement solutions, insurance planning and other financial pieces to best meet her client's goals & needs. For example, she recently partnered with colleagues to help a client solidify his retirement plans and lessen overall tax liability. Lana's role here included comprehensive reviews of Social Security strategies, the spouse's work income and remaining work years, allocation of funds for living expenses and how investment income would be impacted by the targeted tax bracket.