



REDWOOD
— FAMILY OFFICE —

BRINGING ORDER TO YOUR FINANCIAL LIFE

Find the costly gaps.
Keep more of what you earn.



PRESS KIT

Concierge-level tax strategy, financial organization and coordinated oversight

CATHI KORELIN, EA, NTPF, CAA, CTS

Experienced media guest • Interviews • Expert commentary • Speaking

COMPANY PROFILE

Redwood Family Office at a Glance

Redwood Family Office helps successful people find the costly gaps, bring order to complex financial lives and keep more of what they earn.

WHO WE SERVE

Business owners, professionals, real estate investors and families with layered financial lives.

WHAT WE DO

Tax strategy, financial organization, business and real estate review, and advisor coordination.

THE DIFFERENCE

A practical, year-round view that connects decisions often handled in separate offices.

LEADERSHIP

Cathi Korelin, EA, NTPIF, CAA, CTS — tax professional, strategist and author.

EXPERIENCE

More than 18 years in the tax industry and thousands of individual and business returns.

BASED IN

California, serving clients through a modern virtual family office model.

Approved company boilerplate

Redwood Family Office is a concierge-level virtual family office led by tax professional and author Cathi Korelin. The firm helps business owners, professionals, real estate investors and families connect tax strategy, financial organization, business and property oversight, and advisor follow-through. Its purpose is simple: identify costly gaps, create order and help clients make more informed financial decisions throughout the year — not only at tax time.

Core promise

Clarity for what matters. Redwood Family Office brings the moving pieces together so important tax, business, property and financial decisions do not fall through the cracks.

Concierge-level oversight

- ◆ Tax strategy and year-round oversight
- ◆ Business and real estate reviews
- ◆ Financial organization and implementation support
- ◆ Coordination among tax, legal, insurance and financial professionals

FOUNDER PROFILE

Cathi Korelin

Enrolled Agent, tax strategist, real estate specialist and author focused on turning complicated financial lives into clear next steps.

**CATHI KORELIN**

EA • NTPIF • CAA • CTS

Long biography

Cathi Korelin is an Enrolled Agent, tax strategist and founder of Redwood Family Office. With more than 18 years in the tax industry and experience preparing thousands of returns, she understands how quickly tax, business, property and personal financial decisions become disconnected. Her work brings those decisions into one coordinated view.

Cathi serves business owners, professionals, real estate investors and families who need more than a once-a-year tax conversation. Through Redwood Family Office, she helps clients identify costly gaps, organize records and responsibilities, review business and real estate activity, and coordinate follow-through among the professionals already serving the family.

She is the author of *Can I Deduct? My Pet* and co-author of *DeTaxify Your Life*. Her writing translates technical tax topics into practical, memorable guidance for everyday business owners. An experienced podcast and media guest, Cathi holds the EA, NTPIF, CAA and CTS credentials and is available for interviews, expert commentary, podcasts, workshops and speaking engagements.

Short biography — approximately 60 words

Cathi Korelin, EA, NTPIF, CAA, CTS, is the founder of Redwood Family Office, where she helps business owners, professionals, real estate investors and families connect tax strategy, financial organization and advisor follow-through. With more than 18 years in the tax industry, she is the author of *Can I Deduct? My Pet* and co-author of *DeTaxify Your Life*.

EXPERIENCED MEDIA GUEST

Selected Media Appearances

Cathi Korelin has appeared on programs covering advanced tax strategy, real estate investing, private lending, entrepreneurship and the financial questions facing small-business owners.

A proven interview guest

Cathi brings clear explanations, useful examples and a conversational style to technical tax and financial topics. Her previous appearances demonstrate experience with long-form interviews, business television, professional discussions and investor-focused podcasts.

REAL ESTATE & ADVANCED TAX STRATEGY

How Real Estate Investors Can Save Thousands in Taxes Using Advanced Tax Strategies — Investor Fuel

Episode 19: Tax Tips for Real Estate Investors & Private Money Lenders

SMALL BUSINESS & ENTREPRENEURSHIP

The Small Business Voice With Cathi Korelin

Small Business Voice Podcast with the Tax Gurulette, Cathi Korelin

TAX EDUCATION & PROFESSIONAL INSIGHTS

Insights from Your CPA — Part 1

Coach's Corner — Episode 1

Featured guest on

Investor Fuel • Small Business Voice • Coach's Corner • Insights from Your CPA

WATCH OR LISTEN TO CATHI'S APPEARANCES elitepro.tax/pages/resources

FOR JOURNALISTS, HOSTS AND EVENT PLANNERS

Media Topics & Story Angles

Clear, practical commentary on the tax and financial decisions that business owners and families face in real life.

The tax return is the receipt — not the strategy

Why meaningful tax planning happens before year-end, and what owners should review before a transaction is complete.

Can I Deduct? My Pet

A memorable way to explain ordinary-and-necessary business expenses, documentation, mixed-use costs and the line between personal and business spending.

When growing businesses outgrow “just bookkeeping”

The warning signs that a company needs stronger financial controls, payroll discipline, cleaner records and coordinated professional advice.

The family office model for everyday high earners

How a virtual family office can help successful families gain organization and oversight without building a traditional private office.

Real estate decisions that create tax surprises

Entity choices, rentals, short-term rentals, basis, bookkeeping and transaction timing — and why the professionals involved need to communicate.

Reasonable compensation and payroll reality

What S corporation owners often misunderstand, why documentation matters and how payroll decisions ripple through compliance and planning.

Why financial professionals need a quarterback

The cost of siloed advice and the practical value of coordinating tax, legal, insurance, property and financial decisions.

Financial recovery without shame

How organization, cash-flow visibility and small repeatable systems help people regain control after setbacks.

Quotable perspectives

“A tax return tells you what happened. Tax planning helps you influence what happens next.”

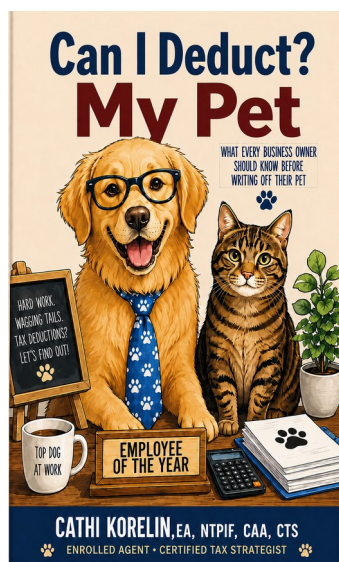
“The most expensive financial mistakes often live in the space between advisors.”

“Good records do more than satisfy compliance — they give an owner better choices.”

THOUGHT LEADERSHIP

Books & Educational Work

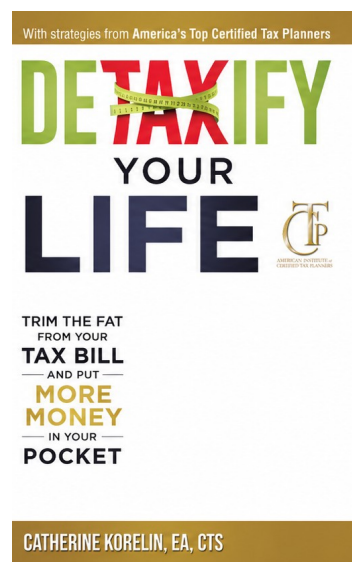
Cathi uses approachable questions, real-world examples and plain language to make tax strategy easier to understand and act on.



Can I Deduct? My Pet

Author

A practical guide to what business owners should know before attempting to write off pet-related expenses — and a lively entry point into documentation, business purpose and mixed personal-business costs.



DeTaxify Your Life

Co-author

A plain-language approach to thinking more strategically about taxes, money and financial decisions — designed to help readers move beyond reactive tax preparation.

Speaking and education

- ◆ Tax strategy for business owners and high-income professionals
- ◆ Business-versus-personal expense decisions and documentation
- ◆ S corporation compensation, payroll and owner compliance
- ◆ Real estate tax and bookkeeping fundamentals
- ◆ Financial organization, recovery and coordinated oversight

MEDIA CONTACT

Interview & Speaking Requests

Available for podcasts, broadcast and print interviews, expert commentary, workshops, webinars, panels and community presentations.



**CLARITY FOR
WHAT MATTERS**

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ORGANIZATION

Redwood Family Office

When requesting an interview

Please include the outlet or event name, topic, format, anticipated length, deadline, whether the appearance will be live or recorded, and any questions or audience details available in advance.

Media-use notes

- ◆ The approved company boilerplate and founder biographies in this kit may be used or shortened for editorial purposes.
- ◆ Please identify Cathi as “Cathi Korelin, EA, founder of Redwood Family Office” on first reference.
- ◆ Previous guest appearances include Investor Fuel, Small Business Voice, Coach’s Corner and Insights from Your CPA.
- ◆ High-resolution logo, headshot and book-cover files are available for editorial use upon request.
- ◆ Commentary is educational and general in nature; individual tax outcomes depend on facts and circumstances.

Suggested introduction

“Our guest is Cathi Korelin, an Enrolled Agent, tax strategist, author and founder of Redwood Family Office. She helps business owners, professionals, real estate investors and families bring order to complex financial lives and make smarter year-round tax decisions.”