



Hooked on Taxes

Q&A with
CalCPA Education
Foundation Chair
Scott Donnelly

As someone who enjoys working with numbers, it seems fitting that 2025-26 CalCPA Education Foundation Chair Scott Donnelly built a successful career as a CPA. Drawn to the taxation aspect of accounting, Scott formed PDM CPAs in 1997 with two other partners and specializes in the real estate industry, estate planning, complex tax compliance and consultation.

Along with serving as past president of the CalCPA Los Angeles Chapter, he has served as a member of the CalCPA Estate Planning, Communications Advisory and Technology committees. He also gives back in his community, including a dedication to homeless transitional housing, food banks, assisting underserved elderly community

and the arts. He has been involved with Rotary, Harbor Interfaith Services, H.E.L.P., Grand Vision Foundation, Angels Gate Cultural Center and the Josephine County Food Bank.

Scott divides his time and spends the winter and spring in Palm Springs and the summer and fall in Grants Pass, OR. An avid traveler, he has outlined plans for the next several years, including national and international travel.

Scott's husband, Wade, is a retired oncology and hematology physician. Son, Alexander, 34, lives in Chicago with wife, Gabi, and their 1-year-old son Dean, and daughter Michelle, 28, lives in Grants Pass and works with special needs children in middle school.

Q: What or who inspired you to become a CPA, and when did you first know it was the right career for you?

I took bookkeeping at Cerritos College and enjoyed working with numbers. When I transferred into the business school at Cal State University, Long Beach I started to hear more about CPAs. I took an audit class and didn't like it very much. I met with my counselor, and he suggested I take tax classes. I was hooked after the first day of the individual taxation class.

Q: What do you enjoy most about being a CPA?

From a professional standpoint I enjoyed working on complicated tax transactions and charitable giving planning. From a personal standpoint I've made great longstanding friendships with many other professionals and their families.

Q: What's one thing about accounting that people might not be aware of?

Unfortunately, many people are not aware of the behind-the-scenes activities we participate in, from assisting legislators in understanding the tax impact of legislation to meeting with middle and high school students

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to discuss accounting careers.

Q: What attracted you to CalCPA and then CalCPA leadership?

As a business owner, I was seeking more interaction with other professionals. I was at a Big Four before going on my own which had provided plenty of interaction. Small and medium size business owners have a much smaller bubble. CalCPA was the perfect solution. I got involved at the CalCPA Los Angeles Chapter and eventually joined the board. After taking the CalCPA Leadership Institute (calcpa.org/about/leadership-institute) I was inspired to get more involved at the state level.



FUN FACTS



You control the accounting profession. What's your first move?

Develop financial literacy education for all middle schools, high schools, colleges and universities. Fiscal responsibility should be taught earlier.

If you weren't a CPA, what career would you see yourself in?
Horticulture

Favorite cuisine?
Japanese



College:

Cerritos College, Cal State University, Long Beach (bachelor's degree in accounting), USC (master's degree in taxation)

Favorite subject in school:
English

Hometown:

Stafford Springs, Conn.

What one word describes you best?
Passionate

Best leadership advice you've received?

Learn from your mistakes.

Most used emoji?



Biggest learning experience?

Having children.

What are three things you can't live without?

Mileage points, a daily expresso and of course, my family!

What can we find you doing in your spare time?

Walking, Tiki Bar hopping

Guilty pleasure?

Trader Vic tropical drink sitting by the pool.

Favorite app and why?

YouTube. I love watching '70s and '80s music videos.

How do you re-energize?

Cook or bake

Most recently binged-watched show?

"Zero Day" with Robert De Niro.

First job?

Newspaper delivery

What superpower would you like to possess and why?

I'm a little hard of hearing so normal hearing would be a superpower for me at this point.

Q: What do you see as the most pressing issues facing the profession? Facing CalCPA?

The issue is the same for both the profession and CalCPA: attracting students to pursue an accounting degree and career. This is a priority for our profession to continue to flourish. Had I learned about accounting and CPAs while in high school my career would have probably started a little quicker. CalCPA is the leader of our profession in California. We need to engage our membership in campaigns and outreach to younger people.

Q: What advice do you have for younger professionals or those thinking of entering the CPA profession?

Try everything. The profession has so many avenues to pursue. If something doesn't quite work, then meet with your supervisor to discuss what you feel you are missing. Don't let other people's beliefs or opinions limit you in your career selection.

Q: What were some of the biggest challenges you faced on your path to becoming a CPA, and how did you overcome them?

The biggest challenge I had was lack of exposure to the profession. Joining

the Accounting Society and meeting other accounting students and professors had a great impact. Now I am going to sound old ... I only had two opportunities a year to take the CPA Exam. It was a manual exam with hundreds of others. I guess the upside was there is no snow in So Cal!

The first time I took the exam my new car was rear-ended by another person taking the exam. I looked in my rearview mirror and noticed he was studying notes while driving. At that instant I was hit. No one was injured. The cars were a little banged up. I

barely failed all four parts of that exam. At that point I told myself I was not going to keep wasting vacation time studying for the exam. I passed on the next attempt.

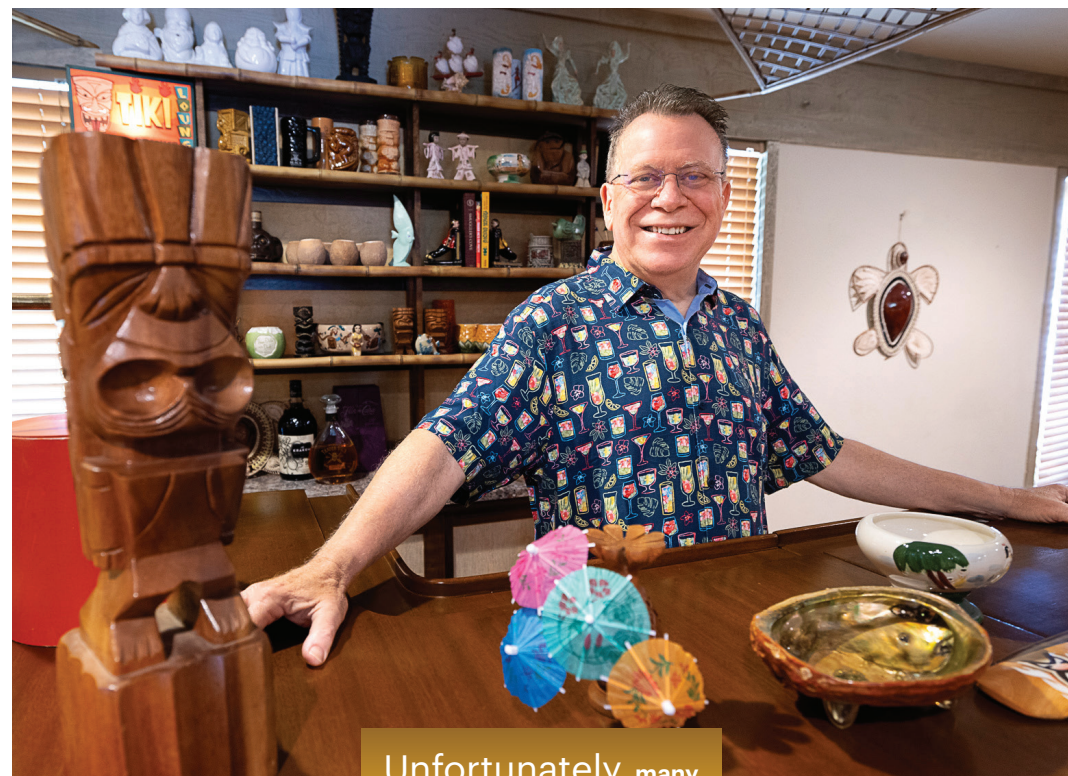
Q: What do you consider to be your greatest accomplishment or proudest moment as a CPA?

Starting a CPA firm with two of my partners, Dana Piazza and Lacy Marlette Jr. We started small and mighty and added a number of great partners, management and staff over the years.

Q: What do you find most rewarding about the CPA profession?

Flexibility with my time was the most rewarding part. It allowed me to spend time with family, community events

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and friends while still working long hours.

Q: What motivates you to do what you do?

I was quite fortunate to retire early in my career. I now want to focus my time on travel, family and community service.

Q: Who have been the strongest influences in your life?

Influencers change during a lifetime. At

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first it was my father who worked hard to support his family. At the beginning of my career, a couple of professors were quite encouraging. When I decided to start a practice, my husband, Wade encouraged and listened to me quite a bit. Now that I am retired my children, Alex and Michelle, are strong influences on me. I strive to stay up to date and current and give back to the community when I can.

