**William F. Marutzky**

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| ProffesionalEXPERIENCE | ATTORNEY**2005 to Present** - Law Offices of William F. Marutzky – Chicago, Illinois**Attorney- Chair Tax Section****1999 to 2005** - Querrey & Harrow - Chicago, Illinois* Representation before the Internal Revenue Service in Administrative Controversies, Bankruptcy, Criminal and Civil Tax Litigation
* Business and Commercial Litigation
* Estate and Tax Planning
* Real Estate Development
* Transactional Structuring

**1995 to 1999** - Tressler, Soderstrom, Maloney & Priess - Chicago, Illinois**Attorney****1977 to 1995** - Law Offices of William F. Marutzky - Chicago, IllinoisAdministrative Criminal, Civil and Transactional Tax MattersPractice with emphasis in taxation, business planning, corporate law, commercial litigation and real estate development**Manager Taxation**Xcor Industries, Inc. - Oak Brook, IllinoisTax Manager for Corporate Holding Company with full responsibility for all tax functions of a Conglomerate Fortune 1000 Company**Tax Accountant**The Northern Trust Company - Chicago, IllinoisWorked for Bank Holding Company preparation of Consolidated Federal Tax Return, Multi State Tax Compliance and local Ad-Valorem Taxes**Tax Specialist**Kenny & Company - Chicago, IllinoisVaried tax work with emphasis on estate and trust taxationPeat, Marwick, Mitchell & Co. – Chicago, IllinoisAreas of concentration were real estate, limited partnerships, taxation and tax return preparation |
| Education | **Master of Law in Taxation, L.L.M.**DePaul University – Chicago, Illinois**Juris Doctor with Honors**Illinois Institute of Technology Chicago-Kent College of Law – Chicago, Illinois**Master of Accounting Science**Northern Illinois University - DeKalb, Illinois**Bachelor of Science in Accounting**Northern Illinois University - DeKalb, Illinois |
| Teaching Experience | **DePaul uNIVERSITY – Full Time**Graduate Tax Program L.L.M.Kellstadt Graduate School of Business Tax Program M.S.T.**Northern Illinois University – Full Time****Illinois Institute of Technology – part Time****Chicago Kent College of Law****North Central College – part Time****Northern Illinois University – Part Time** |
| Professional License | **Law License– State of Illinois**Admitted to practice before the:* United States Supreme Court
* United States Court of Claims
* United States 7th Circuit Court of Appeals
* United States District Court for the Northern District of Illinois
* United States District Court for the Central District of Illinois
* United States District Court for the Eastern District of Wisconsin
* United States Tax Court

**Certified Public Accountant – State of Illinois****REGISTERED CERTIFIED PUBLIC ACCOUNTANT – State of Illinois****Life Insurance producer – State of Illinois** |
| Professional Designation | American College of Forensic Examiners Institute - Fellow American Institute of Certified Public Accountants (A.I.C.P.A.)Certified in Financial Forensics – C.F.F. Association of Certified Fraud Examiners Certified Fraud Examiner – C.F.E.Accredited Estate Planner® (ARP)®Estate Planning Law Specialist (EPLS) |
| Professional Memberships | Advocates Society American Bar Association American Board of Forensic Accounting American Institute of Certified Public AccountantsAssociation of Certified Fraud ExaminersChicago Bar Association  Chicago Chapter of the Association of Certified Fraud ExaminersIllinois C.P.A. SocietyIllinois State Bar AssociationWest Suburban Bar Association |
| Professional Activities | Member Board of Directors  Northern Illinois University Research Foundation 2014 to PresentMember Ethics Committee Illinois C.P.A. Society 2008 to PresentARDC Mentor and Law Practice Management Chicago Bar Association 1995 to PresentMember Board of Governors West Suburban Bar Association 2009 to PresentChairman Federal Tax Procedures Committee  Chicago Bar Association 1994 to 1996Member Federal Tax Council Illinois State Bar Association 1996 to 2007Member Federal Tax Practice & Procedures Committee American Institute of Certified Public Accountants 1995 to 1997Member Tax Practice Management Committee American Institute of Certified Public Accountants 1998 to 1999Chairman Federal Tax Procedures  Illinois C.P.A. Society 1995 to 1999Chairman Practice & Procedures Conference Illinois C.P.A. Society 1998 and 1999 |
| Volunteer Experience | **Catholic Charities -** Advisory Board **Chicago Mount Carmel High School -** Finance Committee**DePaul University College of Business –** Finance Department Advisory Board**IIT Chicago-Kent College of Law –** Alumni Mentor for the Solo and Small Practice Incubator Program**Saints Peter & Paul School -** Member Technology Committee**Weber High School Foundation -** Director **Northern Illinois University Research Foundation** – Director  |

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| Programs & Papers Presented | **2021 – February 5th Quarterly Wealth Counsel Illinois Forum** Review of Illinois Appellate Court Decisions for Illinois Estate Tax Issues**2019 – May 3rd Annual Wealth Counsel Illinois Symposium** Analysis of Court Decisions Affecting State Income Taxation of Trusts **2018 – November 7th Colorado CPA Society** Reviewing Individual Tax Returns**2018 – November 6th Colorado CPA Society** Reviewing Partnership Tax Returns **2018 – October 1st West Suburban Bar Association** Short Cut View of Recent Tax Law Changes **2018 – May 2nd American Institute of Certified Public Accountants** Video Conference Taxation of Property Transactions **2018 – February 26th  American Institute of Certified Public Accountants** Video Conference – 2018 Tax Reform’s Impact on Corporations and Pass-Through Entities**2018 – February 21st  American Institute of Certified Public Accountants** Video Conference – 2018 Tax Reform’s Impact on Corporations and Pass-Through Entities**2018 – January 17th  American Institute of Certified Public Accountants** Video Conference – IRS Audits**2017 – December 21st  American Institute of Certified Public Accountants** Video Conference – IRS Audits**2017 – December 12th  American Institute of Certified Public Accountants** Video Conference – Annual Tax Update: Corporations and Pass-Through Entities **2017 – December 8th  American Institute of Certified Public Accountants** Video Conference – Intermediate Individual Taxation **2017 – December 7th  American Institute of Certified Public Accountants** Video Conference – Tax Research 1 **2017 – December 6th  American Institute of Certified Public Accountants** Video Conference – Taxation of Property Transactions **2017 – December 5th  American Institute of Certified Public Accountants** Video Conference – Individual Tax Fundamentals **2017 – December 4th American Institute of Certified Public Accountants** Video Conference – Taxation of Corporations **2017 – November 29th  American Institute of Certified Public Accountants** Video Conference – IRS Audits **2017 – November 15th American Institute of Certified Public Accountants** Video Conference – Tax Research 1**2017 – November 13th American Institute of Certified Public Accountants** Video Conference – Individuals Tax Fundamentals **2017 – August 31st American Institute of Certified Public Accountants** Video Conference – IRS Audits**2017 – August 18th American Institute of Certified Public Accountants** Video Conference – Estate & Tax Primer **2017 – July 20th American Institute of Certified Public Accountants** Video Conference – Tax Research 1**2017 – July 20th American Institute of Certified Public Accountants** Video Conference – Tax Research 2 **2017 – July 5th American Institute of Certified Public Accountants** Video Conference – IRS Audits **2017 – June 15th American Institute of Certified Public Accountants** Video Conference – IRS Audits **2017 – June 8th American Institute of Certified Public Accountants** Video Conference – Tax Research 2 **2017 – June 6th American Institute of Certified Public Accountants** Video Conference – Estate & Tax Primer**2017 – May 18th American Institute of Certified Public Accountants** Video Conference – IRS Audits**2016 – December 26th American Institute of Certified Public Accountants** Video Conference – Annual Tax Update: Individuals and Sole Proprietors**2016 – December 8th American Institute of Certified Public Accountants** Video Conference – Tax Research II **2016 – December 8th American Institute of Certified Public Accountants** Video Conference – Tax Research I **2016 – December 2nd American Institute of Certified Public Accountants** Video Conference – Annual Tax Update: Individuals and Sole Proprietors**2016 – November 22nd American Institute of Certified Public Accountants** Video Conference – Annual Tax Update: Corporations and Pass-through Entities**2016 – November 22nd American Institute of Certified Public Accountants** Video Conference – Annual Tax Update: Individuals and Sole Proprietors**2016 – November 21st American Institute of Certified Public Accountants** Video Conference – Annual Tax Update: Individuals and Sole Proprietors**2016 – November 18th Wealth Counsel Illinois Forum - Medinah, IL** Fee Structures for Estate Planning and Related Issues **2016 – November 11th American Institute of Certified Public Accountants** Video Conference – Annual Tax Update: Individuals and Sole Proprietors **2016 – November 4th American Institute of Certified Public Accountants** Video Conference - Estate and Gift Tax Primer **2016 – November 2nd American Institute of Certified Public Accountants** Video Conference – Tax Fundamentals of L.L.C. and Partnerships **2016 – September 22nd American Institute of Certified Public Accountants** Video Conference - The CPA’s Role of Buying or Selling a Business **2016 – July 5th American Institute of Certified Public Accountants** Video Conference - Estate and Gift Tax Primer **2016 – May 6th Wealth Counsel Illinois Mega Meeting - Medinah, IL** Legal Malpractice Review for Estate Planning Lawyers**2016 – May 4th Hinshaw & Culbertson LLP - Chicago, IL**Video Conference - Legal Malpractice Review for Estate Planning Lawyers**2016 – March 11th Western Academy of Management – Portland, OR** OMT Symposia: Organizational Scandals and Corruption: Detecting, Exposing and Preventing **2016 – March 2nd LMRM Conference – Chicago, IL** Death, Taxes and Malpractice: Grappling with Estates, Trusts & Probate Lawyers’ Liability **2015 – December 3rd Virginia Society of CPA s – Glen Allen, MO** Advanced Business Law for CPAs**2015 – October 27th Missouri Society of CPA s – St. Louis, MO**Annual Tax Update: Individuals and Sole Proprietors**2015 – October 26th Missouri Society of CPA s – St. Louis, MO**Advanced Business Law for CPAs**2015 – September 22nd Illinois CPA Society** Founders Agreements, Mergers & Acquisitions**2015 – American Institute of Certified Public Accountants** Advanced Mergers, Acquisitions & Sales8 Hour Recorded Course for Video Presentation **2014 – December 16th New York CPA Society**Hot IRS Tax Examination Issues For Individuals And Businesses**2014 – December 5th New Jersey CPA Society**Smart Strategies to Slash Taxes for Closely Held Businesses**2014 – November 6th Wisconsin Society of CPA s – Milwaukee, WI**Key S Corporation Tax Strategies and Compliance Issues **2014 – November 6th Wisconsin Society of CPA s – Milwaukee, WI**Hottest Tax Planning Developments Under the Current Tax Law **2014 – August 22nd Tennessee Society of CPA s – Brentwood, TN**Advanced Business Law for CPAs **2014 – August 21st Tennessee Society of CPA s – Brentwood, TN**Advanced Tax Strategies for LLCs and Partnerships **2014 – June 13th Michigan Association of CPA s – Traverse City, MI**Slashing Taxes for Your Small Business Clients  Corporations, Partnerships & L.L.C.s**2014 – June 11th Michigan Association of CPA s – Detroit, MI**Slashing Taxes for your Small Business Clients  Corporations, Partnerships & L.L.C.s **2014 – March 10th West Suburban Bar Association**Just the Tax Man – Everything You Didn’t Want to Know But Had to Ask**2013 – December 6th Michigan Association of CPA s**Effective and Efficient Senior-Level Review of Tax Returns in Busy Season**2013 – December 5th Indiana CPA Society** The Best Individual Income Tax Update Course **2013 – December 4th Indiana CPA Society** Advanced Tax Structures: Using Tiered Partnerships, Multiple Corporations, Series LLCs, and Disregarded Entities**2013 – December 3rd Indiana CPA Society** Effective and Efficient Senior-Level Review of Tax Returns in Busy Season**2013 – November 1st Society of Louisiana CPA s**Individual Income Tax Update**2013 – October 31st Society of Louisiana CPA s**The Complete Guide to Payroll Taxes and 1099 Issues**2012 – December 18th Connecticut Society of CPA s**Strategies and Tactics in the New War Against Higher Individual Taxes**2012 – December 17th Connecticut Society of CPA s**Hot IRS Tax Examination Issues For Individuals And Businesses**2012 – December 7th Arizona Society of CPA s**1040 Tax Season Survival Guide**2012 – December 6th Arizona Society of CPA s**The Best Federal Tax Update Course**2012 – December 4th Arizona Society of CPA s**Advanced Tax Structures: Using Tiered Partnerships, Multiple Corporations, Series LLCs, and Disregarded Entities**2012 – December 3rd Arizona Society of CPA s**The Best S Corporation, Limited Liability , and Partnership Update Course **2012 – November 28th Society of Louisiana CPA s**Hot IRS Tax Examination Issues For Individuals And Businesses**2012 – November 27th Society of Louisiana CPA s**The Best Federal Tax Update Course**2012 – November 6th South Carolina CPA Society**Effectively and Efficiently Reviewing Tax Returns in Busy Season**2012 – November 5th South Carolina CPA Society**Hot IRS Tax Examination Issues For Individuals And Businesses**2012 – October 23rd Michigan CPA Society**Estate and Life Planning Issues for the Middle-Income Client **2012 – October 22nd Michigan CPA Society**Effectively and Efficiently Reviewing Tax Returns in Busy Season**2011 – December 12 & 13th New York CPA Society**The Complete Guide to Payroll Taxes and 1099 Issues**2011 – December 7th Arkansas Society of CPAs**The Top 50 Mistakes Practitioners Make andHow to Fix Them : Dealing with the IRS**2011 – December 6th Arkansas Society of CPAs**The Top 50 Mistakes Practitioners Make andHow to Fix Them : Dealing with the IRS**2011 – October 21 New York CPA Society**Hot IRS Tax Examination Issues For Individuals And Businesses **2009 - April 24th The Advocates Society**2009 Tax Update for Non Tax LawyersTax Law for General Law Practice**2009 - April 17th National Business Institute**2009 Tax UpdateBankruptcy Forum: What Judges and Trustees Want You to Know**2009 - February 9th West Suburban Bar Association**2008 – 2009 Tax UpdateTax Law for General Law Practice**2008 - April 21st West Suburban Bar Association**Becoming a Tax Return PreparerLiability Without Knowledge Liability Without Your Signature **2008 - January 25th Illinois State Bar Association*** The New Confusing, Conflicting and Expanded

Return Preparer RulesA Guide to Penalty Liability**2007 - February 9th  Illinois State Bar Association*** Review of 2006 Tax Legislation

**2007 - January 26th Illinois State Bar Association*** Review of 2006 Tax Legislation

**2006 - November 20th West Suburban Bar Association*** What Lawyers Need To Know About The IRS So They

Don’t Get In Trouble**2006 - February 16th Illinois State Bar Association*** Tax Procedure and Administration Update

**2006 - January 27th Illinois State Bar Association*** Tax Procedure and Administration Update

**2005 - January 11th  Illinois State Bar Association*** 2005 Advanced Consumer Bankruptcy Issues in Illinois

**2004 - November 12th  Illinois State Bar Association*** 2004 Tax Update

**2003 - January 3rd & 4th New York Society of C.P.A.s*** Individual Income Tax Returns Workshop

**2003 - January 5th & 6th New York Society of C.P.A.s*** Individual Income Tax Returns Workshop

**2003 - July 27th & 28th Texas Society of C.P.A.s*** Payroll Taxes 1099: Everything you need to know

**2003 - August 6th & 7th California Society of C.P.A.s*** Payroll Taxes 1099: Everything you need to know

**2003 - September 8th & 9th Ohio Society of C.P.A.s*** Payroll Taxes 1099: Everything you need to know

**2003 - September 25th Washington Society of C.P.A.s*** Corporate Mergers & Acquisitions

2**003 - October 13th  Illinois State Bar – Bloomington, IL*** Tax Procedure and Administrative Update

**2003 - October 27th  Missouri Society of C.P.A.s*** A.I.C.P.A.’s Complete Tax Update for Individuals & Sole Proprietors

**2003 - November 3rd & 4th  Illinois Society of C.P.A.s*** Individual Income Tax Returns Workshop

**2003 - November 6th Missouri Society of C.P.A.s*** High-powered Tax Planning Strategies for Preserving & Increasing Wealth

**2003 - November 10th  Washington Society of C.P.A.s*** Advanced Planning for LLC & Partnership Transactions

**2003 - November 11th Washington Society of C.P.A.s*** Advanced Planning for LLC & Partnership Transactions

**2003 - November 20th New Jersey Society of C.P.A.s*** A.I.C.P.A.’s Complete Tax Update for Corporations & Pass Through Entities

**2003 - December 1st & 2nd Nevada Society of C.P.A.s*** Individual Income Tax Returns Workshop

**2003 - December 3rd & 4th Nevada Society of C.P.A.s*** Individual Income Tax Returns Workshop

**2003 - December 10th Minnesota Society of C.P.A.s*** Corporate Mergers & Acquisitions

**2003 - December 11th Minnesota Society of C.P.A.s*** A.I.C.P.A.’s Complete Tax Update for Corporations & Pass Through Entities

**2002 - January 7th & 8th Arizona Society of C.P.A.s*** Individual Income Tax Returns Workshop

**2002 - May 11th American Bar Association** * Tax Section Program

**2002 - June 22nd Illinois State Bar Association – Lake Geneva, WI*** 2001 Tax Act Changes Effecting Retirement Plans

**2002 - July 9th Texas Society of C.P.A.s*** Tax Consequences of the Purchase & Sale of a Business

**2002 - July 10th Texas Society of C.P.A.s*** Super Tax Planning Strategies for Retirement Wealth

**2002 - September 26th & 27th Tennessee Society of C.P.A.s*** A.I.C.P.A. Corporate Income Tax Returns Workshop

**2002 - September 30th Iowa Society of C.P.A.s*** Dealing with the I.R.S.

**2002 - October 1st Iowa Society of C.P.A.s*** DOs & DON’Ts of Tax Practice– Sleeping Better at Night

**2002 - October 21st & 22nd Illinois Society of C.P.A.s*** A.I.C.P.A. Corporate Income Tax Returns Workshop

**2002 - October 24th Maryland Society of C.P.A.s*** Tax, Health Care and Asset Protection for Aging Clients

**2002 - November 5th Washington Society of C.P.A.s*** A.I.C.P.A. Practitioners 1040 Workshop

**2002 - November 6th  Washington Society of C.P.A.s*** A.I.C.P.A. Practitioners 1040 Workshop

**2002 - November 14th Maryland Society of C.P.A.s*** Current Developments in Business Law

**2002 - December 4th South Dakota Society of C.P.A.s*** A.I.C.P.A. Practitioners 1040 Workshop

**2002 - December 5th South Dakota Society of C.P.A.s*** A.I.C.P.A. Practitioners Corporate Tax Workshop

**2002 - December 11th Rhode Island Society of C.P.A.s*** Current Developments in Business Law

**2002 - December 12th Rhode Island Society of C.P.A.s*** Elder Care: The Legal Issues of Aging

**2002 - December 17th & 18th Michigan Society of C.P.A.s*** Individual Income Tax Returns Workshop

**2001 - December 21st Utah Society of C.P.A.s*** Taxation and Administration of Compensation & Benefit Plans

**2001 - December 20th Utah Society of C.P.A.s*** Tax Update for the Corporate Accountant

**2001 - December 11th & 12th  Alabama Society of C.P.A.s*** Corporate Income Tax Returns Workshop

**2001 - December 7th Illinois Society of C.P.A.s*** Ranweiler & & Biebl’s Federal Tax Update

**2001 - December 6th South Dakota Society of C.P.A.s*** Practitioners Corporate Tax Workshop

**2001 - November 26th & 27th Nevada Society of C.P.A.s*** Corporate Income Tax Returns Workshop

**2001 - November 28th & 29th Nevada Society of C.P.A.s*** Corporate Income Tax Returns Workshop

**2001 - November 15th & 16th Missouri Society of C.P.A.s*** Individual Income Tax Returns Workshop

**2001 - November 2nd Texas Society of C.P.A.s*** Elder Care: Practice Management and Development

**2001 - November 1st Texas Society of C.P.A.s*** Elder Care: The Financial Issues of Aging

**2001 - October 26th Maryland Society of C.P.A.s*** Tax, Health Care and Asset Protection for Aging Clients

**2001 - October 22nd & 23rd  Illinois Society of C.P.A.s*** Corporate Income Tax Returns Workshop

**2001 - September 28th New York Society of C.P.A.s*** 2001 Tax Act

**2001 - August 24th Montana Society of C.P.A.s*** Taxation & Administration of Compensation and Benefit Plans

**2001 - August 23rd  Montana Society of C.P.A.s*** Current Tax Developments for Industry

**2001 - July 30th Washington Society of C.P.A.s*** Developing an Elder Care Practice

**2001 - July 18th  Texas Society of C.P.A.s*** 2001 Tax Update

**2001 - July 17th Texas Society of C.P.A.s*** 2001 Tax Update

**2001 - June 21st New Jersey Society of C.P.A.s*** Tax, Health Care and Asset Protection for Aging Clients

**2001 - June 7th Oregon Society of C.P.A.s*** Corporate Mergers & Acquisitions

**2001 - January 8th & 9th Arizona Society of C.P.A.s*** Individual Income Tax Returns Workshop

**2000 - December 18th & 19th Arkansas Society of C.P.A.s*** Corporate Income Tax Returns Workshop

**2000 - December 14th & 15th Minnesota Society of C.P.A.s*** Corporate Income Tax Returns Workshop

**2000 - December 7th New Jersey C.P.A. Society*** Tax Planning for Owners & Officers of Small Business

**2000 - December 6th New Jersey C.P.A. Society*** Ranweiler & Biebl’s Federal Tax Update

**2000 - November 29th & 30th Nevada Society of C.P.A.s*** Individual Income Tax Returns Workshop

**2000 - November 16th & 17th Washington Society of C.P.A.s*** Corporate Income Tax Returns Workshop

**2000 - November 8th & 9th Washington Society of C.P.A.s*** Corporate Income Tax Returns Workshop

**2000 - November 1st Florida C.P.A. Society*** Fraud Examinations: Fraudulent Tax Transactions

**2000 - October 31st Florida C.P.A. Society*** Fraud Examinations: Fraudulent Tax Transactions

**2000 - October 17th New Jersey C.P.A. Society*** Elder Care: Tax, Health Care and Asset Protection

**2000 - October 6th Indiana C.P.A. Society*** Fraud Examinations: Investigation Methods

**2000 - October 5th Indiana C.P.A. Society*** Fraud Examinations: Introduction to Fraud Examinations & Criminal Behavior

**2000 - September 29th Florida Institute of C.P.A.s*** Taxation of Small Business Operations

**2000 - August 30th Ohio Society of C.P.A.s*** Solving Complex Earnings & Profits Problems in an S Corporation

**2000 - August 29th Ohio Society of C.P.A.s*** Tax Planning with IRAs- SEPs and Keoghs

**2000 - August 28th Ohio Society of C.P.A.s*** A.I.C.P.A. Experts No Holds Barred Tax Planning for Corporations

**2000 - August 18th Texas Society of C.P.A.s*** Taxation of Stocks, Bonds & other Financial Products

**2000 - August 8th Georgia Society of C.P.A.s*** Fraud Examinations: Misappropriation Schemes

**2000 - January 11th & 12th Arizona Society of C.P.A.s*** Individual Income Tax Returns Workshop

**1999 - December 6th & 7th Tennessee Society of C.P.A.s*** Individual Income Tax Returns Workshop

**1999 - December 1st & 2nd South Carolina Association of C.P.A.s*** Individual Income Tax Returns Workshop

**1999 - November 22nd & 23rd Wisconsin Society of C.P.A.s*** Individual Income Tax Returns Workshop

**1999 - November 18th Illinois Society of C.P.A.s*** C Corporations – Mergers and Acquisitions

**1999 - November 10th North shore MAP Forum*** Summonses and Subpoenas

**1999 - November 3rd Arizona Society of C.P.A.s*** C Corporations – Mergers and Acquisitions

**1999 - October 26th Washington D.C. AIC.P.A. Tax Meeting*** Summonses and Subpoenas

**1999 - October 21st New York Society of C.P.A.s*** C Corporations – Mergers and Acquisitions

**1999 - October 13th Colorado Society of C.P.A.s*** C Corporations – Mergers and Acquisitions

**1999 - September 30th & October 1st Washington Society of C.P.A.s*** C Corporations and Multiple Entities

**1999 - September 21st  Tennessee Society of C.P.A.s*** C Corporations – Mergers and Acquisitions

**1999 - August 23rd & 24th Arizona Society of C.P.A.s*** C Corporations and Multiple Entities

**1999 - August 17th & 18th New York C.P.A. Society*** C Corporations and Multiple Entities

**1999 - August 10th South Carolina C.P.A. Society*** Getting the IRS Off Your Client’s Back

**1999 - February 18th South Chapter Illinois C.P.A. Society*** The New Accountant’s Tax Privilege

**1999 - January 16th Norwest Accounting Group*** Summonses and Subpoenas

**1998 - Administrative Office of the Illinois Courts*** Use and Understanding of Financial Statements in Litigation

**1998 - North Carolina Association of C.P.A.s*** C Corporations and Multiple Entities

**1998 - Illinois C.P.A. Foundation*** C Corporations and Multiple Entities
* C Corporations – Mergers and Acquisitions
* 1998 Annual Tax Conference

**1998 - Georgia C.P.A. Society*** C Corporations – Mergers and Acquisitions

**1998 - South Carolina C.P.A. Society*** Individual Income Tax Returns Workshop
* 1998 Annual Tax Conference

**1998 - Du Page County Estate Planning Council*** Can IRS Levies Reach a Spendthrift Trust

**1998 - Wisconsin Society of C.P.A.s*** Individual Income Tax Returns Workshop
* Internal Control Implications in a Computer Environment

**1998 - Missouri Society of C.P.A.s*** Individual Income Tax Returns Workshop

**1997 - The Ohio Society of C.P.A.s*** C Corporations– Mergers and Acquisitions

**1997 - Missouri Society of C.P.A.s*** C Corporations and Multiple Entities
* Individual Income Tax Returns Workshop

**1997 - Washington Society of C.P.A.s*** C Corporations and Multiple Entities

**1997 - North Carolina Association of C.P.A.s*** Tax Consequences of the Purchase and Sale of a Business
* Solid Tax Planning Tips for Self-Employed Clients

**1997 - Tennessee Society of C.P.A.s*** C Corporations and Multiple Entities
* S Corporations
* Individual Income Tax Returns Workshop
* Tax Consequences of the Purchase and Sale of a Business

**1997 - Wisconsin Society of C.P.A.s*** Today’s Best Ideas in Selecting, Forming and Advising Businesses Entities
* Hard-Hitting Tax Saving Tips for Corporations
* Today’s Hottest Device in Estate Planning: the Family Limited Partnership
 |