

David M. First

TAX & BUSINESS SERVICES

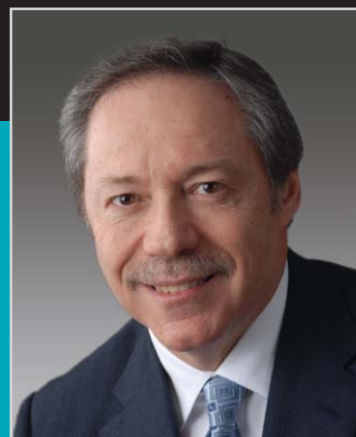
As national Co-Partner-in-Charge of the Trusts and Estates Practice group, David M. First is often engaged by individuals, fiduciaries, closely-held businesses and larger companies for his extensive knowledge and expertise with trust and estate tax matters. He provides a broad range of tax planning, compliance and consulting services to ensure the preservation of family wealth. Mr. First is also a member of the Marcum Family Office and High-Net-Worth Individuals practice groups.

Mr. First lends his expertise on taxation issues related to trust and estate services as a speaker and author. He has delivered numerous presentations and technical seminars to a variety of professional audiences. In addition, Mr. First has written articles for The CPA Journal and the Tri-State Tax Letter Plus, where he served on its Editorial Board.

Mr. First joined the Firm in 1999 as a Partner when he merged his New York City-based accounting practice with Marcum. There he provided tax and consulting services to closely-held businesses and individuals. In addition, he was member of the firm's management committee and an in-house instructor for training seminars on taxation and succession planning. Earlier in his career, Mr. First was a Senior Manager at an international accounting firm.

Professional & Civic Affiliations

American Institute of Certified Public Accountants (AICPA)
New York State Society of Certified Public Accountants (NYSSCPA),
Estate Planning Committee
Estate Planning Council of New York City, President
B'nai B'rith, Past President, Banking and Finance Unit
The Society of Trust & Estate Practitioners



David M. First, CPA*
Partner

SUBJECT MATTER EXPERTISE

Income Tax Planning
Tax Consulting
Estate Planning
Estate Administration

PRACTICE FOCUS

High-Net-Worth Individuals & Families
Closely-Held Businesses
Fiduciaries

EDUCATION

Master of Science, Taxation
Pace University

Bachelor of Science,
Business Administration
Monmouth College



MARCUMGROUP
MEMBER

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