

# Gerald A. Shantzer

## ASSURANCE SERVICES

Gerald A. Shantzer is a Partner in the Firm's Philadelphia office. He has more than 25 years of public accounting experience and has provided services for clients spanning a variety of industries including service businesses, wholesalers, distributors, import/export and manufacturers. Mr. Shantzer's clients range from closely-held businesses to large publicly-held companies with operations throughout the United States and internationally.

Mr. Shantzer's specialized expertise focuses on assisting clients with growth strategies, financing transactions and mergers and acquisitions. He counsels emerging ventures through securities offerings and helps clients expand their businesses globally.

Mr. Shantzer has earned an excellent reputation for providing accounting and business advisory services to growing entrepreneurial companies and family-owned businesses. Most notably, he has extensive experience counseling entrepreneurs with profit and growth planning strategies and works closely with clients in creating business value and wealth.

Mr. Shantzer has a successful history working with family-owned businesses and is often engaged by clients to intervene with and solve complex family business matters. He conducts seminars and has published articles on topics regarding financial issues affecting family owned and closely-held businesses.

In addition, Mr. Shantzer provides investment counseling services as the Partner-in-Charge of Marcum Financial Services, LLC's Philadelphia office.

### Professional & Civic Affiliations

American Institute of Certified Public Accountants (AICPA)  
Pennsylvania Institute of Certified Public Accountants (PICPA)  
Family Enterprise Institute  
Family Firm Institute  
Association for Corporate Growth  
U.S. Department of Commerce Mid-Atlantic District Export Council



**Gerald A. Shantzer, CPA\*, PFS**  
Partner

### AREAS OF EXPERTISE

Mergers & Acquisitions  
Business Consulting  
Investment Counseling

### KEY CLIENTS

Professional Services Firms  
Wholesalers  
Distributors  
Import/Export  
Manufacturers

### DESIGNATIONS

Personal Financial Specialist

### EDUCATION

Bachelor of Business Administration  
Temple University



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MEMBER

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