

# Kathleen Lens

TAX & BUSINESS SERVICES

Kathy Lens has over 30 years experience providing tax and business advisory services to closely-held entrepreneurial businesses and their owners. Her diverse client base spans a variety of industries including manufacturing, distribution and service industries.

Ms. Lens's expertise extends to the Marcum Family Office group and High-Net-Worth Individuals Practice group. She successfully advises the management team of closely-held and family-owned businesses with their day-to-day operations, succession matters, exit strategies, financial growth and estate and personal financial planning.

In addition to providing traditional accounting and auditing services, Ms. Lens assists clients with complex transactions that often involve understanding and analyzing profitability and costs, effective management reporting and business planning.

Ms. Lens actively participates in business and community organizations. She is involved with various growing companies and serves on business advisory boards.

## Professional & Civic Affiliations

American Institute of Certified Public Accountants (AICPA)  
Pennsylvania Institute of Certified Public Accountants (PICPA)  
National Association of Women Business Owners,  
Philadelphia Chapter  
Forum of Executive Women  
Martins Run, Board of Trustees, Past President



**Kathleen Lens, CPA\***  
Partner

## AREAS OF EXPERTISE

Family Wealth Services  
Business & Tax Planning  
Estate & Succession Planning  
Audits

## KEY CLIENTS

Closely-Held Businesses  
Family-Owned Businesses  
High-Net-Worth Individuals

## EDUCATION

Bachelor of Science, Economics  
The Wharton School-  
University of Pennsylvania



MARCUMGROUP  
MEMBER

*\*Licensed by the Commonwealth of Pennsylvania*

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**MARCUM**  
ACCOUNTANTS ▲ ADVISORS