

Lisa M. Hanlon

TAX & BUSINESS SERVICES

Lisa Hanlon is a partner in the Firm's Tax & Business Services division and partner-in-charge of the Firm's Chicago Accounting Services group, which provides comprehensive accounting and tax services to closely held businesses and their owners. She joined Marcum in 2015 via the Firm's merger with Frost, Ruttenberg, & Rothblatt P.C., one of the largest full-service accounting firms in the Chicago region.

Since joining FROST in 1988, Ms. Hanlon has used her problem-solving skills, technical expertise and general business acumen to consult with a wide range of small to mid-size clients, including many in the service industries, such as physician groups, consulting and law firms, as well as medical suppliers, nursing homes and laboratories. She specializes in consulting with companies from the ground up, determining their needs and advising clients on business strategies. She also prepares financial statements for clients and financial institutions, and helps them with their tax needs, both corporate and individual.

Ms. Hanlon served on FROST's Physician Practice Group Committee, headed up the Firm's Women's Initiative Program and has been the featured speaker for small business seminars for various civic organizations. Among her recent accomplishments, she:

- Used her analytical ability and network of resources to hone in on her clients' challenges and match them with the right expertise, software packages and systems to deliver cost-efficient, time-effective solutions.
- Organized a joint seminar with business partners to supplement her clients' staff education needs.
- Aided a Chicago physician group in establishing a foundation to fund charitable works.
- Served as a trusted business adviser to clients contemplating major moves, such as buying and selling real estate or stock, setting up an office or hiring out-of-state employees.
- Saved a client significant end-of-year taxes by setting up a last-minute employee profit-sharing plan to defer taxes.

Professional & Civic Affiliations

American Institute of Certified Public Accountants (AICPA)
Empowering Women's Network
Illinois CPA Society, Women's Executive Committee
Rossenberg Roundtable Group

Articles, Seminars & Presentations

Business Ledger, February 2013 – Choosing the Right Advisors for Your Business Team



Lisa M. Hanlon, CPA*
Partner

AREAS OF EXPERTISE

Accounting and Business Management
Accounting Services
Business Advisory
Closely Held Businesses
Tax Planning and Compliance

KEY CLIENTS

Closely Held Businesses
Healthcare
Physician Groups
Professional Services Firms

EDUCATION

Northern Illinois University,
BS, Accounting



MARCUMGROUP
MEMBER

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