

Monte S. Colbert

TAX & BUSINESS SERVICES

Monte S. Colbert is a Director in the Firm's New York City office. He works closely with SEC reporting, large multi-state, and multi-national companies as well as closely-held and family-operated businesses and their owners. He provides tax consulting, planning and compliance services.

Mr. Colbert has more than 25 years of tax experience and client representation in many industries. He assists clients with broker-dealer matters, executive and deferred compensation, tax controversy including voluntary disclosure, and tax audits. He provides tax consulting services related to research and development and energy tax credits.

Mr. Colbert has been published in The CPA Journal, is a frequent contributor to the Firm's newsletter Beyond the Numbers and conducts training on specific tax topics.

Professional Affiliations

American Institute of Certified Public Accountants (AICPA)
New York State Society of Certified Public Accountants (NYSSCPA)

Publications

Prepare a Better Tax Strategy for an S Corp - *Bloomberg Businessweek*,
Today's Tip, June 8, 2011
Can IRC Section 1341, Claim of Right, Relieve the Pain of Madoff-Related
Losses?, *The CPA Journal*, July 2009
Voluntary Disclosure: To Fear or Not to Fear Criminal Prosecution,
Beyond the Numbers
S Corporations – Increasing Scrutiny by the IRS and What You Need to
Know Now to Survive an Audit, *Beyond the Numbers*
The Qualifying Therapeutic Discovery Project Credit, *Beyond the Numbers*

Seminars & Presentations

Section 83 – Property for Services and Executive Compensation Planning
Section 409(A) – A Practical Approach
Circular 230 – What You Need to Know Now



Monte S. Colbert, CPA*
Director

AREAS OF EXPERTISE

Tax Consulting & Compliance
Tax Controversy
Voluntary Disclosure
Executive Compensation
Research & Development
Tax Credits

KEY CLIENTS

Broker-Dealers
Traders
Investment Management
Manufacturing & Distribution
Equipment
Chemical
Consumer Goods
Pharmaceutical
Medical Equipment
Medical Practices
Pension Consultants
High-Net-Worth Individuals

EDUCATION

Bachelor of Science, Accounting
Brooklyn College, City University
of New York



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MEMBER

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Phone 212.485.5634
monte.colbert@marcumllp.com
www.marcumllp.com

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