Ronald R. Milone

TAX & BUSINESS SERVICES

Ronald R. Milone serves as a partner in the Tax & Business Services division of the Firm's Long Wharf Drive office in New Haven, Connecticut. He serves as a personal financial planning specialist for his clients and is a Financial Industry Regulatory Authority (FINRA) registered representative. He also holds a producer license in the areas of life and health insurance.

Professional and Civic Affiliations

American Institute of Certified Public Accountants (AICPA)
Connecticut Society of Certified Public Accountants (CTCPA)
New Haven Chamber Small Business Council
The Diaper Bank, Board of Directors

Accreditations & Designations

Certified Financial Planner™

Licenses

Series 6
Series 66
Life and Health Insurance
Fixed and Variable Annuities

Securities products and services are offered through: Integrated Financial Planning Services located in North Haven, CT. Members FINRA and SIPC.

Securities and Insurance Products:
Investments are Not Insured by FDIC or any Federal Government Agency | May Lose Value | Not a Deposit of or Guaranteed by a Bank.

Ronald R. Milone, CPA*, CFP®
Partner

SUBJECT MATTER EXPERTISE

Business Taxation
Personal Taxation
Tax Compliance
Retirement Planning
Risk Management
Personal Financial Planning

PRACTICE FOCUS

Family-Owned Businesses
High Net Worth Individuals
Professional Services
Law Firms
Insurance Agencies
Real Estate

EDUCATION

Master of Business Administration
University of Connecticut

Bachelor of Science, Accounting
University of Connecticut

MARCUMGROUP
MEMBER

Licensed by the State of Connecticut

Phone 203.781.9660
ronald.milone@marcumllp.com
www.marcumllp.com

MARCUM
ACCOUNTANTS ▲ ADVISORS