AUDREY LEVIN, CPA*, CFP

PARTNER ▶ TAX & BUSINESS SERVICES

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Audrey Levin is a partner in the Tax & Business Services Division. She has more than 20 years of public accounting experience, specializing in tax planning and compliance for high net worth individuals and pass-through entities.

Ms. Levin has significant expertise advising clients on matters such as mergers and acquisitions, entity structures, partnership operating agreements, gifting strategies, and employee benefit plans. She has served clients in a variety of industries including real estate, private equity-backed businesses, skilled nursing facilities, and professional services.

Ms. Levin is a seasoned and sought-after instructor and has provided training and education for several top 100 CPA firms on a wide array of tax topics including partnership basis, capital accounts and distributions; retirement plans and executive compensation; trust, estate and gift taxation; depreciation, sales and exchanges; general individual and entity tax compliance and planning; foreign taxes and credits; tax elections; and work-life balance, practice development, and delegating and supervising.

Prior to joining Marcum LLP in 2019, Ms. Levin was with Big 4, national and local accounting firms, where she specialized in partnership and individual taxation, as well as financial planning and education.

Professional & Civic Affiliations

American Institute of Certified Public Accountants (AICPA)
Illinois CPA Society

*Licensed in the State of Illinois

EXPERTISE

- Tax Consulting and Planning
- Mergers & Acquisitions
- Trust, Estate, and Gift Tax Planning
- Succession Planning
- Individual, Partnership & Corporate Taxation
- Closely Held Businesses
- International Taxation

INDUSTRY FOCUS

- Private Equity
- Healthcare
- High-Net Worth Individuals
- Professional Services
- Real Estate

EDUCATION

- University of Michigan, Bachelor of Business Administration
- DePaul University, Master of Science in Taxation

ACCREDITATIONS & DESIGNATIONS

- Certified Financial Planner

LICENSES

- Series 7
- Series 63

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