

JEFFREY S. WINKLEMAN, CPA*, MST

PARTNER ► TAX & BUSINESS SERVICES

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Jeffrey S. Winkleman is a Tax & Business Services partner in Philadelphia and serves as partner-in-charge of the Firm's national Corporate Tax Compliance and Planning group.

His broad tax expertise and in-depth knowledge complements his unique service style; he prides himself on being flexible and adapting to his clients' needs. Mr. Winkleman attributes this ability as one of the major reasons for his success.

He has more than 35 years assisting businesses and individuals, reducing their tax burden by his in depth knowledge of the tax law. He also has extensive experience representing buyers and sellers in merger and acquisition transactions. Mr. Winkleman is often quoted in articles and frequently speaks on tax topics to attorneys, trade association members and clients.

He is often engaged by clients needing representation before the Internal Revenue Service and other taxing authorities. His highly intelligent approach to the negotiation process often leads to significant refunds and favorable settlements.

Prior to joining the Firm in 1988, Mr. Winkleman was with a large regional accounting firm. Earlier in his career, he spent 11 years with a "Big 4" accounting firm.

Professional & Civic Affiliations

American Institute of Certified Public Accountants (AICPA)
Pennsylvania Institute of Certified Public Accountants (PICPA)
Montgomery County Estate Planning Council, Past President

EXPERTISE

- Corporate Tax Compliance & Planning
- Mergers & Acquisitions
- Research & Development Tax Credits
- Outsourced Tax Services
- Representation with Tax Authorities
- Accounting Methods
- Estate & Personal Income

INDUSTRY FOCUS

- Manufacturing
- Distribution
- Real Estate
- Professional Services
- High-Net-Worth Individuals
- High Technology

EDUCATION

- Master of Science, Taxation
Temple University

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