

JEFFREY S. WINKLEMAN, CPA*, MST

PARTNER ► TAX & BUSINESS SERVICES



215.297.2610



jeff.winkelman@marcumllp.com

Jeffrey S. Winkelman is a Tax & Business Services partner in Philadelphia and serves as partner-in-charge of the Firm's national Corporate Tax Services Group. He has more than 35 years of experience representing public companies and large privately held companies, their business owners and key executives in a wide variety of industries. Most of his clients operate in many states and have locations or business operations in jurisdictions throughout the world.

He has more than 35 years of extensive experience representing buyers and sellers in merger and acquisition transactions. Mr. Winkelman 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 settlements.

Prior to joining the Firm in 1988, Mr. Winkelman 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

- Federal Compliance and Planning
- Mergers & Acquisitions
- Outsourced Tax Services
- Representation with Taxing Authorities
- Estate & Personal Income

INDUSTRY FOCUS

- Closely Held Businesses
- Manufacturing
- Distribution
- Public Companies
- Professional Services
- High-Net-Worth Individuals
- Private Equity

EDUCATION

- Master of Science, Taxation
Temple University
- Bachelor of Business
Administration, Accounting
Duke University

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