

JO ANNA FELLON, CPA*

PARTNER ► TAX & BUSINESS SERVICES



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Jo Anna Fellon is a tax partner at Marcum. She serves as the National Leader of the Firm's Private Client Services practice, as well as the Office Service Line Partner-In-Charge for the East Hanover, New Jersey office.

Throughout her career, she has contributed to countless tax, philanthropic gifting, and wealth transfer strategies, explored alternative investments, and helped restructure family offices to increase their efficiency.

Jo Anna has taught both internal and external technical tax seminars on a variety of subjects and contributes to several financial publications, including *New Jersey CPA Magazine*, *Wall Street Journal*, *Forbes*, *Accounting Today*, and *New Jersey Business Magazine*.

Professional & Civic Affiliations

American Institute of Certified Public Accountants (AICPA)
New Jersey Society of Certified Public Accountants (NJSCPA)
Park Avenue Club, Board Trustee
First Bank, Former Advisory Board Member
Pomfret School Alumni Association Executive Council, Co-Chair
BW Nice Morris, Past President

Awards

2022 NJBIZ Best Fifty Women in Business
2014 NJBIZ Top Forty Under 40
2016 Master Rainmaker

PRACTICE FOCUS

- Tax & Estate Planning
- Succession Planning
- Federal & Multi-State Tax Return Compliance
- ASC 740 and Fin 48 Issues

INDUSTRY FOCUS

- Financial Services
- Closely Held Businesses
- Family Office
- Private Client Services
- Public Companies

EDUCATION

- Bachelor of Science, Business Administration (Concentration in Accounting), Drexel University

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