

JONAH GRUDA, CPA*

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Jonah Gruda is a tax partner in the Family Wealth Services Group in Marcum's Long Island office. He is a trusted advisor to a diverse group of high net worth individuals serving executives, investment bankers, hedge fund managers, private equity fund managers and entrepreneurs.

Mr. Gruda advises on complex tax matters and specializes in income taxation, executive compensation and stock option planning, estate and gift planning, and wealth preservation.

Prior to joining Marcum, Mr. Gruda was a US practice leader for a large national accounting firm and has spent more than 15 years developing business and technical expertise within the financial services industry.

He has been quoted by *The New York Times*, *Crain's*, CNBC and *Long Island Business News* and is regularly asked to speak on various complex tax issues on regional and national panels. He's been named one of the 40 Under 40 by *Long Island Business News*, received his Bachelor of Science degree in accounting from Pennsylvania State University and, in his spare time, is a private pilot.

Professional & Civic Affiliations

American Institute of Certified Public Accountants (AICPA)
New York State Society of Certified Public Accountants (NYSSCPA)
Private Equity and Venture Capital Committee
Individual Taxation Committee

Articles and Interviews

Joe Biden Used This Strategy to Trim His Tax Bill. You Can, Too. CNBC, 2019
Small Business Owners Look to Grab this 20% Tax. CNBC, 2019
New Year, New Charitable Giving Strategy. Crain's New York, 2018
Picking the Best 529 Plan: You're Probably Doing it Wrong. CNBA, 2018
One Way to Pull the New Tax Law: Start an LLC. CNBC, 2018
Individual Taxpayers Rush to Reap Tax Savings. Crain's New York, 2016

PRACTICE FOCUS

- Executive Compensation & Stock Option Planning
- Tax Compliance & Planning
- Estate & Retirement Planning
- Wealth Preservation

INDUSTRY FOCUS

- Hedge Funds
- Private Equity
- High Net-Worth Individuals & Families
- Real Estate
- Executives/Professionals

EDUCATION

- Bachelor of Science, Accounting
Pennsylvania State University

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