

JOSEPH J. PERRY, CPA*

TAX & BUSINESS SERVICES LEADER ► TAX & BUSINESS SERVICES

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Joseph J. Perry is Marcum's national Tax & Business Services leader and a member of the Firm's Executive Committee, based in the Melville, New York office. He provides significant tax consulting and compliance services to clients in various industries, including publicly traded and closely held companies with local, national, and international operations.

As an integral member of Marcum's senior management team, Mr. Perry oversees nearly 600 professionals in more than 20 offices throughout the U.S., sharing his knowledge, vision, and strategic planning expertise to ensure that Marcum's national Tax Department delivers exceptional client service. He has helped propel the Firm's investment in technology to keep Marcum on the cutting edge of tax law changes and client service delivery. In addition, he is responsible for a portfolio of original tax content to inform and educate the Firm's clients and others about changes in tax law, including timely Tax Flashes, the quarterly Beyond the Numbers newsletter, and the annual Marcum Year-End Tax Guide. He also orchestrated a series of national webinars and regional panel presentations to prepare for the impact of the historic Tax Cuts & Jobs Act of 2017.

Under Mr. Perry's leadership, as the Firm's capabilities and geographic footprint have expanded, so, too, have the service lines and tax offerings available from Marcum's Tax Department, including specialized services in international taxation, state and local tax, R&D credits, cost segregation, and transfer pricing, to name just a few.

With nearly 30 years of experience, Mr. Perry offers his clients considerable expertise in individual and corporate taxation, accounting for income taxes, compensation, and mergers and acquisitions.

He has an in-depth background working with publicly traded companies, serving on the board of Dime Community Bancshares, Inc., as chairman of its Risk Committee and as a member of its Audit Committee. His unique business perspective allows him to provide significant business consulting services for his clients, from both a board and advisor perspective.

As an active member of the community, he serves on the board of the American Heart Association, which named him their 2020 LI Heart Walk Executive of the Year. He is also on the board of the Molloy College Certified Financial Planner Board of Standards, among others.

A recognized tax expert, Mr. Perry has been interviewed by national and regional media, including CNBC, Fox News, The Wall Street Journal, The New York Times, Bloomberg, Accounting Today, Long Island Business News, and many others.

He joined Marcum in 2002 and is a founding member of Marcum University, the Firm's award-winning, in-house training division. Prior to joining Marcum, Mr. Perry was a tax partner at a "Big 4" accounting firm, primarily servicing the financial industry and large public companies.

**Licensed by the State of New York*

PRACTICE FOCUS

- Tax Consulting
- Corporate Taxation
- Mergers & Acquisitions
- Multi-State Taxation
- International Compensation
- Individual Taxation
- Compensation & Management Consulting

INDUSTRY FOCUS

- High Net-Worth Individuals
- Financial Institutions
- Alternative Investments
- Publicly Traded Companies
- Wholesale & Distribution
- Manufacturing
- Publishing Companies

EDUCATION

- Bachelor of Business Administration, Accounting, Long Island University
C.W. Post

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Professional & Civic Affiliations

American Institute of Certified Public Accountants (AICPA)

New York State Society of Certified Public Accountants (NYSSCPA)

National Association of Corporate Directors (NACD)

Association of Audit Committee Members, Inc. (AACMI)

New York Bankers Association

LEA/Leading Edge Alliance, Tax Steering Committee

ECOVIS International, International Tax Task Force

Molloy College, CFP Board of Standards

American Heart Association, Board of Directors

Dime Community Bancshares, Inc., Board of Directors (NASD: DCOM);

Risk Committee Chairman, Audit Committee Member, Compensations Committee Past Member

Cedar Cove Homeowners Association, Board of Directors

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