

KIMBERLEY A. WAITE, CPA*

PARTNER ► ASSURANCE SERVICES



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Kimberley Waite is a partner in the Firm's Assurance Services division and a member of the Employee Benefit Plan group. She joined Marcum in 2015 via the Firm's merger with Frost, Rutenberg, & Rothblatt P.C., one of the largest full-service accounting firms in the Chicago region.

Ms. Waite honed her auditing skills after joining FROST in 1991, with a particular emphasis on employee benefit plans, not-for-profit organizations, and healthcare organizations. Additional clients include HUD projects, professional services firms and real estate. She specializes in keeping up-to-date on the latest developments and technical issues, and regularly counsels her not-for-profit clients on financial issues and industry trends to help them operate more efficiently.

Clients attribute their long-term relationships with Ms. Waite to her technical expertise, above the call-of-duty client service and detail-oriented analytical skills. Her technical acumen and commitment to training earned her membership on the FROST's Quality Control Committee.

She has also spoken on not-for-profit topics for the Illinois CPA Society and at healthcare conferences for LeadingAge Michigan.

Among her accomplishments, Ms. Waite:

- Improved the business office processes and procedures for a not-for-profit client, resulting in substantial savings.
- Uncovered an investment firm accounting error that recovered a substantial sum of money for a homeowners association account.
- Counseled a retailer on how to significantly reduce its tax liability.
- Reviewed loan commitments from different banks for a group of skilled care facilities to ensure the covenants were attainable and that the terms were favorable.

Professional & Civic Affiliations

American Institute of Certified Public Accountants (AICPA)

Illinois CPA Society – Not-for-Profit Committee, former member and past chair;

CPA Endowment Fund of Illinois Board of Directors, Vice President

EXPERTISE

- Employee Benefit Plan Audits
- Not-for-Profit Audits
- Healthcare Organization
- Accounting and Audits
- HUD Audits

INDUSTRY FOCUS

- Employee Benefit Plans
- Not-for-Profit Organizations
- Healthcare Organizations
- HUD Projects
- Professional Services Firms

EDUCATION

- BS, Accountancy
University of Illinois,

MARCUM
ACCOUNTANTS ▲ ADVISORS

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