

# MICHELE LIPSON, CPA\*

PARTNER ► TAX & BUSINESS SERVICES

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Michele Lipson is a Tax and Business Services partner at Marcum LLP based in the Miami office. Ms. Lipson manages and supervises tax engagements, including compliance reviews and tax planning, for a wide range of businesses, with a focus on closely held companies and privately held professional services firms.

Ms. Lipson has worked with family businesses for more than 20 years, assisting in setting up family office structures optimally organized to accommodate the complexities and dynamics involved with a family business. Her services include transitioning to future generations, participating in annual planning meetings, reviewing company performance and developing tax planning strategies.

## Professional & Civic Affiliations

American Institute of Certified Public Accountants (AICPA)  
Florida Institute of Certified Public Accountants (FICPA)  
Health Information Project, Board Director, Treasurer  
Family Business Forum  
Jewish Federation, Estate Planning Seminars, PAC Committee Member  
University of Miami Planned Giving Advisory Board member

## Articles & Presentations

"End of Year: Perfect Time to Balance Your Bottom Line,"  
*South Florida Business Journal*  
SkyRadio, "Innovative Companies," Interview

## Awards

2008 Accounting-Tax Key Partner Award Winner, *South Florida Business Journal*  
2002 Up and Comers Award

## PRACTICE FOCUS

- Healthcare
- Family Business Tax Planning
- IRS Representation
- Closely Held Businesses
- High Net Worth Individuals
- Professional Services

## INDUSTRY FOCUS

- Family & Closely Held Businesses
- Senior Living Communities
- Physician Practice Groups
- Professional Services Firms
- Technology Companies
- Manufacturers
- Distributors

## EDUCATION

- Master of Taxation  
Florida International University
- Bachelor of Accounting  
Tulane University

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ACCOUNTANTS ▲ ADVISORS

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