FINANCIAL / TAX ADVICE

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TAX AND ADVISORY SERVICES

It is my pleasure to welcome you, to this my first column. The Editor and Publisher have asked me to contribute to this publication, so as to help inform you of important tax and personal financial planning issues on a regular basis. By way of background, I am both a certified public accountant, and an attorney, with an advanced degree in taxation. I have been practicing for over thirty (30) years, specializing in individuals, small businesses, as well as securities and family planning. My practice covers planning for children, for complex individual situations, for individuals with basic financial situations, as well as helping the elderly navigate through their tax compliance responsibilities. I also regularly consult on planning for passing assets to succeeding generations at the lowest tax cost. I expect there will be topics that will be of great interest to you. There may also be topics as to which you have little or no interest. As we together explore tax and personal financial planning issues, feel free to advise your publisher and editor of what you think about this column, make suggestions for improvements and let them know of specific topics you wish to have addressed. Upcoming topics will include mid-year tax planning, making the most of charitable donations, effective gifting strategies, long-term care planning, plus many more. While I personally practice out of the New York office of Marcum LLP, I help individuals and businesses throughout the country, especially in Florida. Many of my clients have moved from the New York Metropolitan area to Florida, so I am keenly aware of the special issues you face, especially when changing domicile. Marcum has offices throughout South Florida, including Miami, West Palm Beach, Ft. Lauderdale, and Orlando. If you have specific questions, or need assistance, I or any of my offices will be pleased to assist you. I thank you in advance for your interest in what I have to say. I hope you will find it useful and enlightening. Thanks for joining me on this mission to enlighten you, our readers about topics that I know will be important to you.

Robert Spielman, CPA is a partner in the Tax and Business Services division of Marcum LLP's Long Island office and is a member of its State and Local Tax Practice group. He has more than 30 years' experience working with family-owned businesses and high-net-worth entrepreneurs providing estate planning, business planning and governance, and succession planning services.

Mr. Spielman is a well-recognized expert on estate planning and has lectured on topics such as state and local tax matters, acquiring and selling business units with tax advantaged results, and family business planning.

He has authored articles on personal tax matters and has been published in the New York University Institute on Federal Taxation. In addition, he has secured important New York State and federal private letter rulings and memorandum opinions.

Prior to joining the Firm, Mr. Spielman worked at several prestigious firms. He was also a founding partner of a law firm that specialized in estate planning and business matters.

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