RONALD MILONE, CPA*, CFP

PARTNER ▶ TAX & BUSINESS SERVICES

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Ronald R. Milone serves as a partner in the Tax & Business Services division of the Firm's Long Wharf Drive office in New Haven, Connecticut. He serves as a personal financial planning specialist for his clients and is a Financial Industry Regulatory Authority (FINRA) registered representative. He also holds a producer license in the areas of life and health insurance.

Professional & Civic Affiliations

American Institute of Certified Public Accountants (AICPA)
Connecticut Society of Certified Public Accountants (CTCPA)

Accreditations & Designations

Certified Financial Planner™

Licenses

Series 6
Series 66
Life and Health Insurance
Fixed and Variable Annuities

Investment Advisory Services are offered through Heritage Capital, LLC located in Woodbridge, Connecticut.

Securities and Insurance Products:
Investments are Not Insured by FDIC or any Federal Government Agency | May Lose Value | Not a Deposit of or Guaranteed by a Bank.

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EXPERTISE

- Business Taxation
- Personal Taxation
- Tax Compliance
- Retirement Planning
- Risk Management
- Personal Financial Planning

INDUSTRY FOCUS

- Family-Owned Businesses
- High Net Worth Individuals
- Professional Services
- Law Firms
- Insurance Agencies
- Real Estate

EDUCATION

- Master of Business Administration, University of Connecticut Duke University
- Bachelor or Science, Accounting, University of Connecticut

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