RORRIE GREGORIO

FAMILY OFFICE LEADER ▶ TAX & BUSINESS SERVICES

212.485.5800 rorrie.gregorio@marcumllp.com

Rorrie Gregorio leads the Firm's Family Office Practice and is a partner in the New York City office. She is also a member of the Firm's Family Wealth Services group. She has more than 25 years of extensive experience working directly with high net worth individuals and their families throughout the United States.

Ms. Gregorio counsels families with substantial wealth on various issues related to tax planning, estate planning, and wealth management. She manages their day-to-day fiscal needs including bill paying, insurance reviews, income tax preparation, budgeting, specialized financing facilitation, portfolio reconciliation, household payroll services, entity administration, cash and securities transfers, and other financial matters.

Prior to joining the Firm in 2004, she spent eight years as vice president and group leader in the tax department of a leading, global financial services company and three years with a regional practice. Ms. Gregorio began her accounting career in the high net worth group of a former "Big 8" firm, where she gained hands-on experience managing complicated tax, financial and estate planning projects.

Ms. Gregorio is very involved in the New York City business community. As founder and president of a networking group serving high net worth individuals, she spearheads educational seminars for women on topics related to wealth-building and lifestyle changes. She is a member of the Marcum Diversity & Inclusion Committee and co-chairs the annual Marcum Women's Forum in New York. In addition, she has lectured on the importance of teaching the next generation on responsibility of wealth.

Professional & Civic Affiliations

Wealth Dimensions, Founder and President
Calvary Hospital, Advisors Council Member
AICPA Family Office Group, Member
NYC Chapter of Enterprising & Professional Women, Member
Breast Cancer Prevention Partners, Board Member

Awards & Honors

Honored in the inaugural edition of "Notable Women in Accounting & Consulting" by Crain's New York, 2018

One of the 50 Most Influential Women in Private Wealth - Private Asset Management, 2015

EXPERTISE

- Family Office Services
- Wealth Management
- Tax Planning
- Estate Planning

INDUSTRY FOCUS

- High Net Worth Individuals & Families
- Corporate Executives

EDUCATION

- Bachelor of Science, Accounting
  Hofstra University

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