

JAMES M. PHILBIN, CPA*, PFS, MST, CFP

PARTNER ► TAX & BUSINESS SERVICES

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James M. Philbin is a partner in the Firm's Boston, Massachusetts office. Mr. Philbin is a member of the Firm's New England and National Real Estate Industry Group. He has over 35 years of client advisory experience in tax, business consulting, and financial accounting and assurance services. Jim works with our closely-held businesses and families to help them with their business, estate and financial planning and tax needs.

In recognition of his considerable experience in personal financial planning, Mr. Philbin was awarded the designation of Personal Financial Specialist by the American Institute of Certified Public Accountants and is also a Certified Financial Planner.

Mr. Philbin also works with many emerging businesses in such industries as technology, internet commerce and professional services. He has extensive experience with strategic tax planning for businesses and entity structuring for LLCs, Partnerships and Corporations. He also advises international companies on establishing a U.S. business presence, providing advisory and compliance support.

Prior to joining Marcum, Mr. Philbin was a shareholder in a large, regional accounting firm in New England.

Professional & Civic Affiliations

American Institute of Certified Public Accountants (AICPA)
Massachusetts Society of Certified Public Accountants (MSCPA)
Irish Network Boston
Boston Estate Planning Council
NAIOP Massachusetts
Real Estate Finance Association (REFA) retired
My Brother's Keeper, Inc. - Board Member and Treasurer
Marion Manor, Board Member
Foxboro Youth Basketball Association, Board Member, continuing volunteer

Awards & Honors

Beta Gamma Sigma Honor Society
Personal Financial Specialist, AICPA
Certified Financial Planner

EXPERTISE

- Real Estate
- Estate Planning
- Income Tax Planning
- S Corporations
- Partnerships

INDUSTRY FOCUS

- Multi-Generational Family Business
- High Net-Worth Individuals
- Real Estate Developers & Owners
- High Technology
- Manufacturing
- Professional Services

EDUCATION

- Master of Science, Taxation, Bentley University
- Master Personal Financial Planner Certificate, Bentley University
- Bachelor of Science, Accounting & Economics, Boston College

MARCUM
ACCOUNTANTS ▲ ADVISORS

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