

PROFESSIONAL AND PERSONAL SUMMARY

- Education: Xavier University BSBA 1975; MBA 1978
- Accounting And Tax Practice started in 1978
- Licensed CPA in 1983
- Maintains an average of approximately 100 hours of education per year (only 40 are required)
- Married with two sons
- Real Estate investor since 1980
- Five permanent employees and five seasonal employees
- Provide accounting and tax services for clients in many states
- Clients include individuals, small businesses, trusts, LLC's, professionals and real estate investors
- Frequent speaker to various businesses, civic and investment organizations on various tax and financial topics
- Part-time Tax commissioner for the Village of Elmwood Place and Arlington Heights
- Conducts a "Tax Aspects of Retirement" class for a Fortune 500 company in Cincinnati
- Featured in the Sunday Cincinnati Enquirer, Business Section, November, 1987 on the effect of the 1986 Tax Reform Act
- Appeared on radio talk-shows regarding the tax aspects of real estate
- Featured in an article in the July, 1994 edition of Kiplinger Personal Finance Magazine
- Author of tax related articles that have appeared in local and national publications
- Served on Sycamore Township Planning and Zoning Committee (1993-1994)
- Past Trustee, President and Treasurer of the Cincinnati Real Estate Investors Association (membership 500)
- Served as Treasurer of the Cincinnati Chapter of MADD
- Past Vice President and Past President of Reading Chamber of Commerce
- Treasurer, City of Reading Community Improvement Corporation
- Member of the Roger Bacon Band Boosters
- Member of the St. John the Evangelist Finance Committee
- Past member of the St. John the Evangelist Education Commission
- Member of the North College Hill Business Association

Services Provided:

- Tax Returns – Individual, Corporate, Partnership, Gift, Trust and Estate
- Monthly and quarterly payroll taxes
- Monthly and quarterly Financial Statements
- Estate Planning
- Small business advisor