SPEAKER MEDIA KIT

New York

Offices Nationwide
(877) 525-4462
info@kbkg.com
KBKG.com
Our firm provides access to our knowledge base and experienced industry leaders with over 100 years of total experience in their respective fields. We are a frequent content provider for publications like AICPA, Accounting Today and Bloomberg BNA. Members of our leadership team have presented sessions in conjunction with the AICPA, numerous state CPA societies, the Tax Executives Institute, and many more.

KBKG is registered with the National Association of State Boards of Accountancy (NASBA), as a sponsor of continuing professional education on the National Registry of CPE Sponsors. We broadcast live weekly webinar sessions to hundreds of professionals providing CPE related to our services.

We have been asked to present to industry specific trade groups including an audience at the annual Restaurant Finance and Development Conference and Driving Force, a national network of CPA/consulting firms that collaborate to provide accounting and business advisory services to automobile dealers.

MEMBER OF AMERICAN SOCIETY OF COST SEGREGATION PROFESSIONALS

Many of our team are certified members of the American Society of Cost Segregation Professionals (ASCSP). The ASCSP was founded in 2006 as the pre-eminent professional Society for all members of the cost segregation industry in response to the growing need for education, credentials, technical standards, and a Code of Ethics within the industry. Those members regularly contribute content and provide CPE training to other members of the ASCSP.
ABOUT KBKG

Established in 1999 with offices in major markets throughout the US, KBKG is one of the oldest and largest independent providers of specialty tax service in the country. By focusing exclusively on value-added tax services, we complement your traditional tax and accounting team.

SINGLE SOURCE SOLUTION

We are unique in the marketplace as we offer a single source solution for depreciation/cost segregation, research & development tax credits, green energy tax incentives, and transfer pricing. Our model is to provide you with a single point of contact who can then interject the appropriate subject matter expert within our team.

SEAMLESS TEAMWORK & COLLABORATION

We help determine which tax programs benefit clients and stay committed to handling each relationship with care and diligence. Our ability to work seamlessly with your team is the reason so many tax professionals and businesses across the nation trust KBKG.

Our practice is staffed by full time specialists with engineering, valuation, green building, estimating, and construction backgrounds as well as tax professionals, attorneys, engineers, and economists.

NATIONWIDE SERVICE
As leaders in the industry, we understand that not every client is the same nor is every situation. We have the capability to scale our solutions to meet the client’s need.

We have hosted hundreds of webinars on our platform to share our industry experience and in-depth knowledge on tax credits and incentives.

Our subject matter expertise include topics such as:

- Research & Development Tax Credits
- Cost Segregation Tax Planning
- Tangible Property Repair Regulations
- Bonus Depreciation Update
- Advanced Tax Planning related to Cost Segregation
- Interaction between Cost Segregation and 1031 Exchanges
- Transfer Pricing Fundamentals and Practical Solutions
- Transfer Pricing After Tax Reform

Keep in mind that we are not limited to the listed topics and have the capabilities to speak on custom topics that work for you and your target audience.
KBKG COURSE TOPICS

As educators in the field of tax credits, incentives and deductions, we specialize in presenting seminars and webinars for CPAs, attorneys, investment firms, and other real estate professionals. The following is a listing of all of our industry topics. Please contact Anna Chen at anna.chen@kbkg.com for more information on a particular course topic.

- **RESEARCH & DEVELOPMENT TAX CREDITS**
  - Provide a general overview of the R&D Tax Credit
  - Learn how to identify qualifying projects
  - Understand the various calculation methods
  - Discuss the project implementation and issues to consider

- **COST SEGREGATION AND THE IMPACTS OF TAX REFORM**
  - Explain what cost segregation is, how taxpayers benefit from it, and how it has changed over the years
  - Identify tax issues that should be considered in conjunction with a cost segregation study
  - Recognize the potential impact of cost segregation on estate planning
  - Discuss the impact of tax reform on cost segregation
  - Discuss cost segregation opportunities related to the tangible property regulations and disposition regulations
  - Identify new opportunities to immediately deduct abandoned building components, avoid recapture tax, and expense demolition costs

1 Hour | 1 Hour

1 Hour
The Final Tangible Property Repair Regulations are in full effect, yet many taxpayers are not in compliance or are missing opportunities to take full advantage of these new rules. This session covers compliance requirements as well as potential tax planning strategies on both a retroactive and prospective basis. Our presenter will also go over in-depth examples and real-life case studies. Participants will be better able to identify tax saving opportunities and be in compliance with these new regulations.

- Understand changes and new requirements presented by the final repair and disposition regulations
- Identify opportunities for missed deductions and other tax planning ideas
- Gain an in-depth knowledge of Unit of Property rules

The Bonus Depreciation Update presentation will provide information on bonus depreciation and other stimulus related depreciation issues. Our presenter will clarify when these topics are applicable and provide guidance on how to tax plan accordingly. The topics covered will include:

- New bonus depreciation timeline and applicable periods and requirements
- The definition of “Qualified Improvement Property” – new category
- Tax reform changes
- Self-constructed property rules
- Acquired property requirements
- How it interacts with cost segregation

1 Hour

KBKG COURSE TOPICS
This presentation will focus on more specific tax planning related concepts that include cost segregation and recent developments in tax law. This advanced session will provide insight on how to most effectively apply cost segregation principles.

- The interplay between estate planning for real estate and cost segregation
- How cost segregation can help condominium developers reduce gain on sale of units
- Effectively utilizing the GAA election to preserve deductions on demolished buildings
- Cost segregation tax law developments and changes

Cost segregation and Tax Deferred Exchanges of Real Estate under IRC 1031 are two of the most valuable tax planning concepts that a real estate owner can utilize today. This presentation will provide insights on how a taxpayer can utilize both effectively and maximize their tax deferrals. We will also go over in-depth examples and case studies. The speaker will review concepts including:

- 1245 and 1250 property definitions
- Basis computations
- Recapture tax and its affects
- When an opportunity is optimal
Transfer pricing is widely considered the most contentious tax issue for multinational companies. In this introductory seminar, our transfer pricing economist provides insights on the fundamentals of US and international cross-border pricing rules. He also reviews practical strategies that companies and their advisors can utilize to assess transfer pricing risks and opportunities, based upon 20-plus years of US and international transfer pricing experience.

- Fundamentals of US and global transfer pricing regulations
- Transfer pricing documentation rules for penalty protection
- Strategies for assessing transfer pricing risks in the US and internationally
- Tax Reform and Transfer Pricing overview
- Recent International Transfer Pricing Developments

The Tax Cuts and Jobs Act changed the tax environment for all companies with cross-border operations. This tax reform focused presentation reviews the opportunities and risks facing US and international companies. Our transfer pricing economist will review timely issues including:

- Overview of transfer pricing regulations in the US and internationally
- Tax Reform - FDI, GILTI and BEAT
- Tax competition with lower US tax rates
- Outbound and inbound transfer pricing strategies under tax reform
- Managing transfer pricing risks after tax reform
KBKG NEW YORK OFFICE
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New York NY 10018

Paul McVoy is a Principal for KBKG’s Tax Credit Consulting practice. He has managed research credit studies and consulted for numerous companies throughout the country. He is also an author and has featured articles in publications such as AccountingToday.

Sumit Sharma, CCSP, is a Principal for KBKG, specializing in Cost Segregation and Fixed Assets in the northeast regional market. He often teaches continued education courses and has written for publications such as AccountingToday.

Alexis McClellan is a Regional Director for KBKG. She has over 10 years of sales and marketing experience. She strives to always be a resource and advocate for her clients.

David Zarin is a Regional Director for KBKG. He has over 25 years of experience working in business development and client relationship management roles in the professional services industry.

Our employees are a group of passionate people who care about their communities. Our New York office is actively involved in numerous community outreach and charitable organizations.

KBKG New York professionals work in conjunction with engineers and tax experts from our headquarters to perform thousands of tax projects that have resulted in hundreds of millions of dollars in benefits for our clients in New York and across the country. Please see below for a partial list of clients located in the region. For more information about our New York team, please see the biographies enclosed in the following pages.

NEW YORK CLIENTS

KBKG has performed thousands of tax projects that have resulted in hundreds of millions of dollars in benefits for our clients.

Costco Wholesale

ROLEX

NYSC

LENNAR

ROSE ASSOCIATES

Toll Brothers
America’s Luxury Home Builder™

FD STONENATER

FRIEDLAND PROPERTIES

ZECKENDORF DEVELOPMENT, LLC

start

S3
PAUL MCVOY

PRINCIPAL - RESEARCH & DEVELOPMENT TAX CREDIT SERVICES

ABOUT

Paul McVoy is a Principal at KBKG and devotes his time to consulting companies in maximizing their R&D tax credit claims. He has more than 14 years of experience and has successfully represented many clients, from start-up to Fortune 100 and 500 companies in tax controversy related to their research credits claims. Paul has worked closely with engineers, scientists, software developers and C-Suite personnel in a wide range of industries throughout the country.

EXPERIENCE

- Speaker - Tax Executives Institute
- Speaker - R&D Government Contracting Roundtable
- Presenter - CPA Leadership Institute Webinar
- Presenter - KBKG Webinars
  - Research & Development Tax Credits
  - Research & Development Tax Credits for Life Sciences Industry

SPEAKER FEATURED IN

- Tax Executives Institute
- CPA Leadership Institute
- Government Contracting Roundtable

EXPERT SUBJECT MATTER TOPICS

- Research & Development Tax Credits
- Research & Development Tax Credits for Life Sciences Industry
SUMIT SHARMA, CCSP, ASA

PRINCIPAL - COST SEGREGATION SERVICES

ABOUT

Sumit is a Principal of KBKG in the New York City office specializing in Cost Segregation and Fixed Asset services, including Tangible Property Repair Regulation analyses. Sumit has over 12 years of experience in the cost recovery and tax incentives industry. Prior to joining KBKG in 2015, Sumit worked for six years as a tax manager with PwC and five years at a boutique valuation & appraisal firm in NJ.

EXPERIENCE

- Author - Accounting Today
  - Maximize Gains on Sale of Condos in Mixed-Use Developments
  - Condo Tax Basis Allocation Studies
  - IRS Penalizes Cost Segregation Provider for Aiding and Abetting
- Speaker - New York State Society of CPAs, Westchester Chapter
  - Tangible Property Regulations and Cost Segregation
- Speaker - Pennsylvania Society of Tax & Accounting Professionals
  - Tax Reform Updates and Fixed Asset Tax Planning
- Presenter - KBKG Webinars
  - Introduction to Cost Segregation, Cost Segregation Software Tools, Tangible Property Repair Regulations, Bonus Depreciation

SPEAKER FEATURED IN

- Accounting Today
- New York State Society of CPAs
- Pennsylvania Society of CPAs

EXPERT SUBJECT MATTER TOPICS

- Cost Segregation
- Fixed Assets
- Depreciation Methods
- Tangible Property Capitalization Regulations
- Green Building Tax Incentives
GIAN P. PAZZIA, CCSP
CEO

ABOUT

Gian is the CEO of KBKG and oversees all strategic initiatives for the company. He has over 20 years of experience in the specialty tax industry. He is also the subject matter expert for our 263(a) Repairs vs. Capitalization services. Gian is a recognized leader in the cost segregation field and previously served as President of the American Society of Cost Segregation Professionals.

Gian was one of the few that has provided expert witness testimony on Cost Segregation issues before the IRS.

EXPERIENCE

- Author: AICPA, Accounting Today, Bloomberg BNA, Strafford Publications
- Speaker
  - CalCPA Federal, State, Local and International Taxation Conference
  - Speaker - Lorman Education Webinars
- Presenter - Tax Resolution Institution (TRI)

SPEAKER FEATURED IN

- Accounting Today (Author)
- Bloomberg BNA (Author)
- AICPA (Author)
- CalCPA
- Tax Resolution Institution
- Strafford Publications
- National Association of Tax Professionals
- State Society (OR, WA, IL, CO, ETC)
- Lorman Education

EXPERT SUBJECT MATTER TOPICS

- Cost Segregation
- Bonus Depreciation
- Tangible Property Repair Regulations
- Cost Segregation Software Tools and Strategies
LUIS A. GUERRERO, MBT

CO-FOUNDER/PRINCIPAL, KBKG VICE PRESIDENT

ABOUT

Luis (Lou) Guerrero, MBT, is Vice President and Co Founder of KBKG. As the firms Tax Practice Leader, he is responsible for a team of engineers and tax professionals that addresses cost segregation, green energy tax credits, employment based tax credits and other tax-related matters. Mr. Guerrero is also responsible for the firms Research & Development (R&D) Tax Credit Department.

EXPERIENCE

- Author - Accounting Today
  - Maximize Gains on Sale of Condos in Mixed-Use Developments. Condo Tax Basis Allocation Studies
- Speaker - New York State Society of CPAs, Westchester Chapter
  - Tangible Property Regulations and Cost Segregation
- Speaker - Pennsylvania Society of Tax & Accounting Professionals
  - Tangible Property Regulations and Cost Segregation

SPEAKER FEATURED IN

- PrimeGlobal Manufacturing and Distribution Group
- New York State Society of CPAs

EXPERT SUBJECT MATTER TOPICS

- Cost Segregation
- Green Building Tax Incentives

EDUCATION

- GOLDENGATE UNIVERSITY
  Masters in Taxation
- UNIVERSITY OF CALIFORNIA, SANTA BARBARA
  Accounting Core Program
- CALIFORNIA STATE UNIVERSITY, CHICO
  Bachelors in Business Administration, Finance and Economics
CJ ABERIN, CCSP

PRINCIPAL - COST SEGREGATION SERVICES

ABOUT

CJ Aberin is a Principal at KBKG and oversees the Green Building Tax Incentive practice. Over the last several years, CJ has performed Green Building Tax Incentive studies and Cost Segregation for thousands of clients in various industries that range from Fortune 500 companies to individual real estate investors. His tax savings advice has been featured in numerous publications. He has also spoken at seminars to educate CPAs across the country on various real estate tax issues.

EXPERIENCE

- Author - Accounting Today
  - Congress retroactively extends temporary tax breaks for real estate for 2017 in budget bill

- Author - Strafford Publications
  - Building Green: Commercial Tax Incentives & Strategies and 179D Deductions for commercial buildings

- Author - California Real Estate Journal

- Author - New York Real Estate Journal

- Presenter - KBKG Webinars
  - Green Building Tax Incentives, courses hosted to thousands of CPAs nationwide
  - Real Estate: Tax Legislative and Policy Outlook

SPEAKER FEATURED IN

- California Real Estate Journal
- New York Real Estate Journal
- Strafford Publications

EXPERT SUBJECT MATTER TOPICS

- Cost Segregation
- Green Building Tax Incentives
  - 45L Tax Credits
  - 179D Tax Deductions
KEVIN ZOLRIASATAIN

PRINCIPAL / PRACTICE LEADER - RESEARCH & DEVELOPMENT TAX CREDIT SERVICES

ABOUT

Kevin is a Principal and the Practice Leader of KBKG’s Research and Development (R&D) Tax Credit Services. He has over 12 years of consulting experience providing R&D tax credit services to companies of various sizes. Over his career Kevin has documented hundreds of millions of dollars in research credits. He has accumulated extensive experience successfully defending R&D credit claims under IRS and state examination.

EXPERIENCE

- Author - Accounting Today
  - R&D Tax Credits Available for Agriculture and Farming
  - R&D Credit Opportunity In Improving an Existing Product
- Speaker - Tax Resolution Institution (TRI)
- Presenter
  - Federal, State, Local and International Taxation Conference
  - CalCPA - CHC Research & Development Credit
  - McKonly & Asbury’s Collaborate Conference
- Presenter - KBKG Webinars
  - Research & Development Tax Credit
  - Research & Development Tax Credit for Software Development
  - R&D Tax Credits and the IRS: How to Prepare for Audit

SPEAKER FEATURED IN

- CalCPA
- AICPA
- Accounting Today
- Tax Resolution Institution

EXPERT SUBJECT MATTER TOPICS

- Research & Development Tax Credit Overview
- Research & Development Tax Credit for Software Development
- R&D Tax Credit – Audit Defense

EDUCATION

CALIFORNIA STATE UNIVERSITY NORTH RIDGE

Bachelor’s in Business Administration, Finance and Economics

PERSONAL INTERESTS

- Sports: Golf, Basketball, Football, Paintball
- Photography: A passion of Kevin’s since high school, particularly black and white photography
- History: Favorite time period to read about is the American revolution
- Travel: Favorite places to visit are in Europe
MALIK JAVED, CCSP

PRINCIPAL - COST SEGREGATION SERVICES

ABOUT

Malik Javed is a Principal and oversees engineering operations for Cost Segregation projects at KBKG. He is a Certified member of the American Society of Cost Segregation Professionals (ASCSPI) and is currently a member of the ASCSP Technical Standards Committee. Since joining KBKG in 2004, Malik performed hundreds of Cost Segregation studies, reviewed architectural and engineering drawings and construction cost budgets.

EXPERIENCE

- Author
  - IRS Updates Cost Segregation Audit Techniques Guide
- Author - AICPA
  - Using Cost Segregation with Estate Planning
- Speaker - Long Island Tax Professionals Symposium
  - Repair Regulations
- Speaker - Lorman Education Webinars
  - Current Issues in Cost Segregation
- Presenter - National Society of Accountants (NSA) Webinars
  - Bonus Depreciation and Cost Segregation
- Presenter - KBKG Webinar
  - Tangible Property Repair Regulation and Bonus Depreciation

SPEAKER FEATURED IN

- National Association of Accountants
- AICPA
- Lorman Education
- CPA Leadership Society

EXPERT SUBJECT MATTER TOPICS

- Tangible Property Repair Regulations
- Cost Segregation
- Green Building Tax Incentives
  - 45L Tax Credits
  - 179D Tax Deductions
LESTER COOK, CCSP

PRINCIPAL - FIXED ASSET & COST SEGREGATION SERVICES

ABOUT

Lester is a Principal and the Practice Leader of KBKG’s Fixed Asset service and a certified member of the American Society of Cost Segregation professionals. Throughout his career, Lester has completed cost segregation analyses on thousands of properties ranging from office space leasehold improvements to multi-billion dollar industrial complexes and hotel/resort projects. He has worked with many Fortune 500 companies successfully representing his claims to both IRS and Financial Auditors.

EXPERIENCE

- Author - Accounting Today
  - Tax Court Rejects Taxpayer’s Land vs. Building Allocation
- Speaker - Driving Force
  - Tax Planning Opportunities for Auto Dealers
- Speaker - Restaurant Finance & Development Conference
  - Bonus Depreciation and Cost Segregation
- Speaker - ASCSP National Conference
  - TPR Interpretation and Practical Application
- Speaker - Michigan Society of CPAs Conference
- Presenter - KBKG Webinars
  - Cost Segregation
  - Bonus Depreciation
  - Tangible Property

SPEAKER FEATURED IN

- Accounting Today (Author)
- Tax Resolution Institution
- ASCPA National Conference
- Restaurant Finance & Development Conference
- Michigan CPA Society Conferences

EXPERT SUBJECT MATTER TOPICS

- Fixed Assets
- Cost Segregation
- Bonus Depreciation
- Tangible Property Repair Regulations
- Green Building Tax Incentives
JONATHAN TUCKER

PRINCIPAL - RESEARCH AND DEVELOPMENT TAX CREDIT SERVICES

ABOUT

Jonathan Tucker is a Principal for KBKG’s R&D tax credit consulting practice. Based in Atlanta, GA, Jon has over 15 years of experience providing federal business tax advisory services to clients in various industries including technology, manufacturing (including heavy, light, and paper and pulp), transportation, healthcare, retail and consumer products, hospitality, media and entertainment, financial, and other professional services industries.

EXPERIENCE

- Author
  - *Furthering the American Recovery from the Coronavirus*

- Speaker - Georgia Society of CPA’s (GSCPA)
  - *Tax Planning with the R&D Tax Credit*

- Speaker - South Carolina Association of CPA’s (SCACPA)
  - *Tax Planning with the R&D Tax Credit*

- Speaker - Florida Society of Enrolled Agents (FSEA)
  - *Overview of the R&D Tax Credit*

- Presenter - KBKG Webinar
  - *Research & Development Tax Credit Overview*

EXPERT SUBJECT MATTER TOPICS

- Research & Development Tax Credits
- Research & Development Tax Credit for Software Development
- Research & Development Tax Credit for the Life Sciences Industry
- Cost Segregation
- Bonus Depreciation
- Fixed Assets
- Accounting Method Changes
- Tangible Property Repair Regulations

EDUCATION

UNIVERSITY OF GEORGIA

- Masters in Taxation
- Bachelors in Accounting

PERSONAL INTERESTS

- Favorite Sports Team
  - Georgia Bulldogs
- Traveling
- Politics
- Cooking
- Reading
- Trying new places to eat
EDDIE PRICE, CCSP

PRINCIPAL - COST SEGREGATION SERVICES

ABOUT

Eddie is a Principal with KBKG and oversees the Southern region and its Texas-based operations. He is a Certified Cost Segregation Professional (CCSP) with the American Society of Cost Segregation Professionals (www.ASCSP.org). With over 35 years of cost segregation experience dating back to the Investment Tax Credit period, Eddie is one of the most experienced experts in the industry.

EXPERIENCE

- Author - The Tax Advisor
  - Guide to Expensing Roofing Costs
- Author - Bloomberg BNA
  - RS Releases Controversial Opinion on Building Placed-In-Service Dates
- Author - AICPA
  - New Qualified Improvement Property Category
- Author - Accounting Today
  - IRS Penalizes Cost Segregation Provider for Aiding and Abetting
  - Presenter - KBKG Webinars
    - Introduction to Cost Segregation, Cost Segregation Software Tools, Tangible Property Repair Regulations, Bonus Depreciation

SPEAKER FEATURED IN

- AICPA (Speaker and Author)
- Bloomberg BNA (Author)
- Accounting Today and TaxPro Today
- Texas Radio Show - On-Air Speaker
- State Society of CPAs (TX, NY, FL, OK)

EXPERT SUBJECT MATTER TOPICS

- Introduction to Cost Segregation
- Cost Segregation Software Tools
- Tangible Property Repair Regulations
- Bonus Depreciation
ALEX MARTIN

PRINCIPAL -
TRANSFER PRICING SERVICES

ABOUT

Alex Martin is Principal and Transfer Pricing Practice leader at KBKG. He has 24 years of full-time transfer pricing experience working in Washington, D.C.; Melbourne, Australia; and Detroit, Michigan over the course of his career. Alex has assisted companies in many industries addressing transfer pricing issues on a US and global basis. Prior to joining KBKG, Alex’s transfer pricing team was named one of the world’s leading transfer pricing consultancies by International Tax Review for three years in a row.

EXPERIENCE

- Author - Accounting Today
  - Priced Right

- Author
  - Tax Reform’s Great Overlooked Opportunity - Transfer Pricing and FDI
  - Lost in Translation: Where Did My Cashflow Go?
  - Name and Shame: Governments Publish Corporate Tax Report Cards
  - Transfer Pricing Under Fire
  - How Could One Little Section of the Tax Code Cause So Much Trouble?
  - Starbucks Transfer Pricing Leaves a Bitter Taste

- Speaking Engagements
  - Podcast - On the Air Speaker: Accounting Today - Tax Reform and Transfer Pricing
  - Bloomberg BNA - Introduction to Transfer Pricing
  - Michigan Association of CPAs - Here Come the Transfer Pricing Auditors
  - Ohio Society of CPAs - An Insider’s Guide to Transfer Pricing
  - World Bank International Fiscal Association - Transfer Pricing Introduction

- Webinars
  - Up Close and Personal with Transfer Pricing
  - Transfer Pricing and Tax Reform Opportunities
  - Transfer Pricing for the Growing Business
  - Is Your Company Paying Its Fair Share of Taxes?

EXPERT SUBJECT MATTER TOPICS

- Transfer Pricing – US, OECD and International
- US Tax Reform and Transfer Pricing – GILTI, FDII and BEAT tax
- OECD Base Erosion and Profit Shifting Program (BEPS)
- Transfer Pricing Documentation – Masterfile, Local File and Country-by-Country Reporting
- Advance Pricing Agreements (APA) and Competent Authority
- Global Supply Chain Structuring

EDUCATION

- UNIVERSITY OF MICHIGAN
  Masters in Public Policy

- TULANE UNIVERSITY
  Bachelors of Science in Economics

PERSONAL INTERESTS

- Coaching
- Traveling
- Hiking
- College football
- Soccer
Michael Maroney is a senior manager with KBKG. He advises clients on tax matters related to federal and state R&D tax credits. He has advised numerous Fortune 1000 clients across a variety of industries. He has successfully defended his client’s R&D claims before the IRS and state taxing authorities. He has been an instructor on these topics for numerous CPA and industry associations, and has authored articles related to federal and state R&D tax credits.

**EXPERIENCE**

- Author - Accounting Today
  - R&D Credit Opportunity In Improving an Existing Product
- Speaker - American Foundry
- Speaker - Tax Executives Institute
- Speaker - Metalcasting Congress
- Speaker - Illinois Society of CPAs
- Presenter - McConley & Asbury’s Collaborate Conference
- Presenter - KBKG Webinars
  - Research & Development Tax Credits
  - Research & Development Tax Credits for Life Sciences Industry

**SPEAKER FEATURED IN**

- American Foundry
- Metalcasting Congress
- Tax Resolution Institute
- Illinois Society of CPAs
- McConley & Asbury’s Collaborate Conference - 2016
- Accounting Today

**EXPERT SUBJECT MATTER TOPICS**

- Research & Development Tax Credits
- Research & Development Tax Credits for Life Sciences Industry