

TAX & BUSINESS SERVICES

Gary R. Gross

Gary Gross is chairman of Rachlin's financial services practice. He has extensive experience in financial, estate and family planning, and he works closely with high-net-worth individuals and family businesses to ensure the preservation of family wealth. He was one of the first CPAs in the country to be awarded the designation of Personal Financial Specialist by the American Institute of Certified Public Accountants. He also has a Series 65 and 66 securities license and a life, health and annuities insurance license.

Mr. Gross has more than 30 years of experience in complex domestic and international tax matters. His expertise includes real estate, trust and tax planning for businesses, corporate reorganizations and real estate syndications.

In addition, he is regularly called upon for litigation support services involving complex financial disputes, damage calculations and matters involving executive compensation, violation of tax laws and financial loss resulting from personal injury.

Professional & Civic Affiliations

American Institute of Certified Public Accountants (AICPA)
Florida Institute of Certified Public Accountants (FICPA)
Institute of Profit Advisors, *Advisory Council Member*

Seminars & Lectures

AICPA, Corporate Income Tax Workshop
FICPA, Subchapter S Corporations Seminar on
Corporate Reorganizations



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Gary R. Gross, CPA*/PFS
Senior Advisor

P R O F I L E

AREAS OF EXPERTISE

Complex Corporate Transactions
Estate Planning
Industrial & Corporate Income Tax
Industrial & Family Financial Planning
Insurance Analysis
International Tax
Litigation Support
Mergers & Acquisitions
Risk Management

KEY CLIENTS

Aviation Companies
Dealerships
Domestic & Foreign Entities
High-Net-Worth Individuals
Professional Service Organizations
Real Estate Companies

EDUCATION

Bachelor of Science, Business Administration
Bachelor of Science, Accounting
University of North Carolina

DESIGNATIONS

Personal Financial Specialist
Registered Investment Advisor

**Licensed by the State of Florida*

Rachlin Cohen & Holtz LLP