

## TAX &amp; BUSINESS SERVICES

## Michele Lipson

Michele Lipson is a partner in charge of the firm's Tax and Business Services division. Ms. Lipson's experience includes managing and supervising tax engagements, including compliance reviews and tax planning, for a wide range of businesses.

Ms. Lipson has been working with family businesses for more than 15 years. She assists with setting up family office structures and understands the complexities and dynamics involved with a family business. Ms. Lipson has assisted clients with transitioning to future generations as well as participated in annual family meetings to review company performance and discuss tax planning opportunities.

Ms. Lipson was a participant in the Family Business Forum through the Eugenio Piño and Family Global Entrepreneurship Center at Florida International University.

### Professional & Civic Affiliations

American Institute of Certified Public Accountants (AICPA)

Florida Institute of Certified Public Accountants (FICPA)

Tax 20 Group, *Member*

Temple Beth Am, *Budget Committee*

Up and Comers 2002 Award

Family Business Forum

Family Counseling Services, *Board Member*

Family Firm Institute, *Member*

Baker Tilly International, *Member*

### Articles, Seminars & Lectures

"End of Year: Perfect Time to Balance Your Bottom Line,"

*South Florida Business Journal,*

Tax 20, *Rachlin Representative*

Jewish Federation, *Estate Planning Seminars, PAC Committee Member*

SkyRadio, "Innovative Companies," *Interview*

South Florida Business Journal Key Partner Award, *Finalist*



**Michele Lipson, CPA**  
Partner

## P R O F I L E

### AREAS OF EXPERTISE

Family Business Tax Planning

IRS Representation

Closely-Held Businesses

High Net Worth Individuals

### KEY CLIENTS

Family & Closely Held Businesses

Professional Services Firms

Manufacturers

Distributors

### EDUCATION

Master of Taxation

*Florida International University*

Bachelor of Accounting

*Tulane University*

