

## TAX &amp; BUSINESS SERVICES

## Mitchell J. Margolies

Mitchell Margolies is a partner within the firm's Tax & Business Services division. He has more than 20 years of experience providing services in the areas of real estate, closely held businesses and succession planning, business combinations, and income and estate tax planning for high-net-worth individuals.

Mr. Margolies has assisted his clients in the structuring of selling of their business enterprises as well as the restructuring of their current business in a tax-efficient manner. In connection with his real estate experience, Mr. Margolies has assisted his clients with tax-free exchanges as well as other planning regarding the acquisition and disposition of their real estate interests in a tax efficient manner. He has also provided income and estate planning for his high-net-worth clients.

### Professional & Civic Affiliations

American Institute of Certified Public Accountants (AICPA)  
 Florida Institute of Certified Public Accountants (FICPA)  
 South Florida Tax Litigation Association  
 North Dade/South Broward Estate Planning Council  
 Estate Planning Council of Broward County  
 Fort Lauderdale Tax Council  
 Florida Atlantic University - Adjunct Professor

### Articles, Seminars & Presentations

CNN Newsmakers - January 2008 - T.V. appearance  
 Florida Atlantic University-Financial Seminar,  
 presenter - January 2007  
 Talk About Money with Jim Barry - TV appearance June 2006



**Mitchell J. Margolies, CPA\*/PFS  
 Partner**

## P R O F I L E

### AREAS OF EXPERTISE

Business Combinations  
 Closely Held Businesses  
 Succession Planning  
 Real Estate Development &  
 Transactional Planning  
 Estate & Gift Planning  
 IRS Representation

### KEY CLIENTS

Real Estate Developers & Investors  
 Professional Service Organizations  
 Distributors  
 High-Net-Worth Individuals

### EDUCATION

Master of Taxation,  
 Florida International University

Bachelor of Business  
 Administration, Accounting,  
 University of Florida

