

STONE CARLIE

Michael A. Klein, CPA, CFP

*Principal
Tax and Business Services*



Responsibilities

- Coordinates and delivers tax planning and consulting services
- Review tax returns for tax compliance and tax planning issues
- Coordinate estate and financial planning for individuals

Qualifications

- Certified Public Accountant
 - Possesses twenty-eight years of professional experience in a variety of industries including, Automotive, Banking/Finance, Communications, Distribution, Engineering & Construction, Healthcare, Manufacturing, Mining, Personal Service Companies, Professional Services, Real Estate, Retail and Wholesale
- Extensive experience in income tax planning for businesses and their owners
 - Estate and financial planning services provided for individuals
 - Experience in business mergers and acquisitions and assisting merging companies with tax planning and compliance
 - Experience in S corporation taxation partnership, limited liability company

Memberships

- Member, American Institute of Certified Public Accountants
- Member, Missouri Society of Certified Public Accountants
- Member, Institute of Certified Financial Planners
- Member, International Association of Financial Planning

Education

- Bachelor of Science in Business Administration - Accounting – Indiana University
- Extensive continuing professional education attended annually