

## ALAN J. DLUGASH, CPA

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### Alan J. Dlugash, CPA

Partner

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Alan J. Dlugash, CPA, is a Partner at Marks Paneth & Shron LLP. He primarily concentrates on tax planning and financial analysis for high net worth individuals and their related business entities, including partnerships, small corporations and estates and trusts. He also consults to small businesses on executive compensation matters and assists accountants and lawyers in understanding the tax ramifications of their clients' activities and transactions. In addition, Mr. Dlugash has been involved in hundreds of matrimonial cases, providing tax services, evaluating businesses' interests and analyzing tax shelters and other entities.

*CPA Magazine* named Mr. Dlugash one of the nation's "Top 50 IRS Representation Practitioners" for 2008. "Top 50" practitioners are selected by the magazine for outstanding contributions in tax and audit work across the United States.

With over 30 years of accounting and taxation experience, Mr. Dlugash began his career with Price Waterhouse & Co. where he advanced to the position of tax manager. He then founded Dlugash & Kevelson, where he spent 23 years as the managing partner until his firm merged with Marks Paneth & Shron in 2003.

Mr. Dlugash is a member of the New York State Society of CPAs (NYSSCPA) and is a current member and past chairman of the Individual Tax Committee. Additionally, he is currently a member of the IRS Relations Committee. He has also served on the Society's Task Force on Tax Simplification as well as on the Special Committee for Reform of the Tax System whose report has been widely circulated. Additionally, he is a member of the Tax Division of the American Institute of CPAs (AICPA). He also holds the distinction of being licensed with the National Association of Securities Dealers as a registered financial principal in New York.

A prominent industry thought-leader, Mr. Dlugash is a regular speaker at the NYSSCPAs' annual conferences, the AICPAs' annual conferences and a variety of matrimonial conferences. He has appeared on ABC, CBS, NBC, CNBC, Bloomberg TV and NY1 to discuss current tax matters. He has been widely quoted in illustrious publications including *Money Magazine*, *The Wall Street Journal*, *Bloomberg Wealth Manager*, *CNNMoney.com*, *Tax HOTline*, *The CPA Journal*, *The Daily News*, and *The New York Post*. In addition, Mr. Dlugash offers instruction on individual tax matters via the AICPAs' video instruction courses.

Over the years, Mr. Dlugash has donated his time and expertise to a variety of charitable associations. He currently serves as both treasurer and member of the Board of Directors for the International League for Human Rights and is also a member of the Board of Directors of his cooperative association.

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### Alan J. Dlugash (Continued):

Mr. Dlugash holds a Bachelor of Science in economics and a Master of Business Administration in Accounting from the Wharton School of Business of the University of Pennsylvania. He is licensed to practice public accounting in New York. Mr. Dlugash is based in the Manhattan office of Marks Paneth & Shron and resides in Larchmont, New York.

### Areas of Specialty:

Tax  
High Net Worth Individuals  
Estates and Trusts  
Partnerships  
Small Corporations  
Consulting to Accountants and Attorneys

### CPA Certification Membership:

American Institute of Certified Public Accountants  
New York State Society of Certified Public Accountants

### Selection of Press and Recent Presentations:

“Millions Face Prospect of Owing AMT,” *The Missoulian*  
“Reflections On Reform: A CPA Journal Panel Discussion on the SET Tax Proposal and Report of the President’s Advisory Panel on Federal Tax Reform,” *The CPA Journal*  
“Alternative Minimum Tax Could Snag Millions,” *St. Petersburg Times, Casper-Star Tribune, The Tuscaloosa News and The Democrat and Chronicle*  
“Six Don’t Miss Tax Breaks,” CNNMoney.com  
“How to Value Personal Use of a Company Car,” *Tax HOTLine*  
“Finding the Money for Catholic Schools,” *The Daily News*  
“Cool Coupon Keeper,” *Parent Magazine*  
“Bob and Weave,” *Bloomberg Wealth Manager*  
“IRS Wishing Up to Average-Joe Tax Evasion,” *The New York Post*  
“At Tax Time, It’s Hard to Cut Cord,” *The Wall Street Journal*  
Alternative Minimum Tax: New Developments and Tax Planning, November 2006, *JP Morgan Chase Financial Advisors Group*  
Tax Increase Prevention & Recommendation Act, November 2006, *Tax Planning Strategies Conference*  
Divorce: Assisting Clients and Their Attorneys, August 2006, *2006 Strategic Planning for High Net-Worth Clients Conference*  
AMT: Strategies to Escape Its Reach, September 2005 and September 2006, *Sophisticated Tax Planning for Your Wealthy Clients Conference*  
Getting the Best Financial Settlement for Your Divorce Client in New York, November 2005, *National Business Institute Seminar*  
AICPA Tax Update Video Series

### States Licensed In:

New York

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### Alan J. Dlugash (Continued):

#### Education:

University of Pennsylvania, Wharton School of Business  
Bachelor of Science  
Major: Economics

University of Pennsylvania, Wharton School of Business  
Master of Business Administration  
Major: Accounting

#### Professional Associations and Memberships:

Member, American Institute of Certified Public Accountants  
Member, Tax Division  
Member, New York State Society of CPAs  
Member, Internal Revenue Service Relations Committee  
Member, Individual Tax Committee  
Past Chairman, Individual Tax Committee

#### Charitable Affiliations:

Member, Board of Directors, International League for Human Rights