

# James M. Philbin

## TAX & BUSINESS SERVICES

James M. Philbin is a partner in the Firm's Boston, Massachusetts office. Mr. Philbin is a member of the Firm's New England and National Real Estate Industry Groups. He has over 30 years of experience in audit, tax and business consulting. He works with our closely-held businesses and families to help them with their business, estate and financial planning and tax needs.

In recognition of his considerable experience in personal financial planning, Mr. Philbin was awarded the designation of Personal Financial Specialist by the American Institute of Certified Public Accountants and is also a Certified Financial Planner.

Mr. Philbin also works with many emerging businesses in such industries as technology, internet commerce and professional services. He has extensive experience with strategic tax planning for businesses and entity structuring for LLCs, Partnerships and Corporations. He also advises international companies on establishing a U.S. business presence, providing advisory and compliance support.

Prior to joining Marcum, Mr. Philbin was a shareholder in a large, regional accounting firm in New England.

### Professional & Civic Affiliations

American Institute of Certified Public Accountants (AICPA)  
Massachusetts Society of Certified Public Accountants (MSCPA)  
Irish Network Boston  
Boston Estate Planning Council  
Real Estate Finance Association (REFA)  
Foxboro Youth Basketball Association, Board Member  
Marion Manor, Board Member

### Awards & Honors

Beta Gamma Sigma Honor Society  
Personal Financial Specialist, AICPA  
Certified Financial Planner



**James M. Philbin,**  
CPA\*, PFS, MST, CFP  
Partner

### AREAS OF EXPERTISE

Real Estate  
Estate Planning  
Income Tax Planning  
S Corporations  
Partnerships

### KEY CLIENTS

Multi-Generational Family Business  
High-Net-Worth Individuals  
Real Estate Developers & Owners  
High Technology  
Manufacturing  
Professional Services

### EDUCATION

Master of Science in Taxation  
Bentley University  
  
Master Personal Financial Planner  
Certificate  
Bentley University  
  
Bachelor of Science, Accounting  
and Economics  
Boston College



MARCUMGROUP  
MEMBER

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ACCOUNTANTS ▲ ADVISORS