



James Grimaldi, Esq., CPA

Partner

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Jim, a partner located in the firm's New York City office, provides strategic tax planning, research and compliance services to business owners, family offices, not-for-profits, and high net worth individuals. As a tax attorney he also advises clients on trust and estate planning issues.

He is a member of the NY State Bar Association and serves on its committee of income of estates and trusts and its committee on estates and gift taxes. In October 2002, the Department of the Treasury appointed Jim to the taxpayer advocacy panel. Jim is admitted to the New York State Bar, U.S. Tax Courts and the Southern and Northern District Courts. Licensed as a certified public accountant in New York, Jim is a member of the American Institute of CPAs (AICPA) and the New York State Society of CPAs. He also serves on the Board of the Gotham Comedy Foundation, Inc. and the Thomas Meo, Jr. Scholarship fund.

Jim earned a bachelor's degree in accounting from Fordham University, and a law degree from Brooklyn Law School.

"Whether it's creating a tax strategy that allows clients to grow their business faster, or estate planning that helps ensure their future, I strive every day to provide value to my clients' bottom line."

— James Grimaldi, Esq., CPA, Partner

PRACTICE AREAS

INDUSTRY

- ❖ Dental Practices
- ❖ Financial Services Industry
- ❖ Manufacturing/Distribution
- ❖ Not-For-Profit
- ❖ Real Estate

SERVICE AREA

- ❖ Trust and Estate Planning
- ❖ Representation and Tax Examination
- ❖ Business Consulting
- ❖ State and Local Tax (SALT)
- ❖ Tax Research and Strategic Planning
- ❖ Tax Compliance & Reporting