

Alan G. Badey, CPA, CGMA

MANAGING PARTNER, WHITE PLAINS OFFICE

abadey@citrincooperman.com

WESTCHESTER

(914) 949-2990



EDUCATION

B.A., Pace University
AICPA Certificate of
Educational Achievement in
Tax Planning & Advising for
Closely-Held Businesses

LICENSES

Certified Public Accountant
in the State of New York
Chartered Global
Management Accountant

SERVICES

Business Consulting
Commercial Tax Services
Mergers and Acquisitions
Tax
Strategy and Business
Transformation
Tax Compliance
Tax Research and Planning

INDUSTRIES

Broker-Dealers
Financial Services
Health Care
Hedge Funds
Law Firms
Manufacturing and
Distribution

"A better lifestyle and greater wealth is every business person's dream. My goal is to help my clients attain both."

Alan Badey is the managing partner of Citrin Cooperman's White Plains, NY office. Within this leadership role, he focuses on driving the office to provide exceptional client service, and to enhance opportunity for all partners and staff in the White Plains office. Alan also serves on the Firm's executive committee, allowing him the opportunity to shape overall firm mission and strategy. In addition, he is the co-leader of both the firm's Health Care Practice and Law Firm Services Practice.

EXPERIENCE

As a hands-on tax and business advisory partner, Alan works closely with business owners to employ best practice strategies with the goal of improving efficiencies and growing his clients' businesses. He provides a variety of consulting services to identify and improve revenue drivers as well as and minimize tax obligations through strategic structuring. Throughout his over 25 year career, Alan has worked with private and family, closely-held businesses in various industries, including health care, law firms, manufacturing and distribution, and financial services, among others. Regardless of industry, he is committed to learning about his clients' businesses and life in an effort to be able to provide actionable, realistic advice.

As part of helping his clients grow their businesses, Alan has an expertise in mergers and acquisitions consulting. Whether a client is ready to acquire or sell, or is proactively planning ahead for an exit, Alan advises his clients on preparing their business, due diligence, deal structuring, and

more.

HONORS & AWARDS

Westchester County's Most Trusted Advisor (CPA)

PRESENTATIONS & PUBLICATIONS

Alan is a frequent speaker for the New York State Society of Certified Public Accountants' Foundation for Accounting Education (FAE), the New York State Bar Association (NYSBA), New York University (NYU), the New York Bankers Association (NYBA), the Westchester County Medical Society (WCMS), and the Healthcare Financial Management Association (HFMA).

AFFILIATIONS

Member, American Institute of Certified Public Accountants (AICPA)

Member, New York State Society of Certified Public Accountants (NYSSCPA)

- Past President, NYSSCPA Westchester Chapter
- Past Chairman, NYSSCPA Young CPA Committee
- Past Chairman, NYSSCPA Federal & State Tax Committee – Westchester Chapter
- Past Committee Member, Executive Committee on Committee Operations

Member, Estate Planning Council of Westchester

Member, Business Advisory Board for Mahopac National Bank

Past Fundraising Board Member, Blythedale Children's Hospital

Alumni Mentor, Pace University

Advisor, Mercy College Accounting Program

Past Board Member, Putnam County Economic Development Corporation (PCEDC)

OUTSIDE THE OFFICE

Alan resides in Bedford, NY with his wife Maria and two children. He coached baseball in the local sports association and donates time to various charitable organizations in Westchester.