



CITRIN COOPERMAN®
Accountants and Advisors

Howard P. Klein, CPA, MST

PARTNER

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WESTCHESTER

(914) 949-2990



EDUCATION

Bachelor of Science in
Accounting, Syracuse
University
Master of Science in
Taxation, Pace University

LICENSES

Certified Public Accountant
in the State of New York

SERVICES

Commercial Tax Services
Private Client Services
Tax Compliance
Tax Research and Planning
Trust and Estate

INDUSTRIES

Law Firms
Manufacturing and
Distribution
Real Estate

“Clients entrust me with a great responsibility – to guide them and help grow and preserve their assets. I work tirelessly each day to earn that trust.”

Howard Klein, leader of the Trust and Estate Group, is a tax partner with more than 30 years of experience in the areas of tax, financial, estate, and succession planning.

EXPERIENCE

Howard’s clients include closely held businesses and business owners in a diverse array of industries, including real estate, health care, law firms, apparel, and manufacturing and distribution. He also works with high net worth individuals.

As the leader of the Citrin Cooperman’s Trusts and Estate Practice, Howard brings a wealth of knowledge and experience to all facets of planning for growth and the future. He helps clients achieve both their business and personal goals, which are often intertwined. His areas of expertise include business succession planning, retirement planning, employee stock option planning (ESOP’s), college financial planning, and creating multi-generational wealth preservation and gifting programs. He also represents clients before various taxing authorities.

Howard’s problem-solving approach helps clients overcome the many challenges associated with succession and estate planning. He often collaborates with his clients’ other advisors to ensure a holistic approach.

Prior to joining Citrin Cooperman, Howard was the managing partner and

co-head of the Trusts and Estate department for a local firm.

PRESENTATIONS & PUBLICATIONS

Howard has appeared as an expert in the Westchester County Business Journal and Westfair Online, among other media publications, and has also authored various articles on topics such as estate tax planning. He is regularly engaged as a speaker, moderator, and panelist for various industry forums.

AFFILIATIONS

Member, American Institute of Certified Public Accountants (AICPA)

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

Past president, NYSSCPA's Westchester Chapter

Member of the Board of Directors, Chairman of the Professional Outreach Committee, and Co-Chair of the Estate and Financial Planning Committee

Board of Directors Member, Westchester County Association (WCA)

Member, Westchester Estate Planning Council

Board Chair, American Heart Association, Westchester Chapter