



CITRIN COOPERMAN®

## Joseph Neri

PARTNER, CITRIN COOPERMAN ADVISORS LLC

[jneri@citricooperman.com](mailto:jneri@citricooperman.com)



### EDUCATION

Bachelor of Business  
Administration in  
Accounting, Baruch College

Masters of Business  
Administration in  
Taxation/Finance, Baruch  
College

### LICENSES

Certified Public Accountant  
in the State of New York

### SERVICES

High Net Worth Individuals  
Private Client Services  
Tax Compliance  
Tax Research and Planning

### INDUSTRIES

Entertainment, Music, and  
Sports  
Financial Services  
Law Firms  
Restaurants and Hospitality

Joseph Neri is a tax partner in the firm's New York City office. He provides federal, state, and local tax compliance and consulting services for high-net-worth individuals, closely-held businesses, trusts, and private foundations.

### EXPERIENCE

Joseph is a member of the firm's High Net Worth Individuals Practice. His focus is providing clients with quality service along with effective and efficient tax planning strategies to accomplish their financial goals.

Prior to joining Citrin Cooperman, Joseph worked at a regional public accounting firm headquartered in New York City.

### PRESENTATIONS & PUBLICATIONS

U.S. Information Exchange with U.K. leads to Adjustment in Foreign Tax Credit Claimed

### AFFILIATIONS

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

Member, American Institute of Certified Public Accountants (AICPA)