JAMES B. McEVOY, CPA

WORK EXPERIENCE

James B. McEvoy, CPA - Sole Practitioner, October 2001 to Present
- Prepare income tax returns for individuals, family businesses and trusts
- Prepare in depth estate plans for clients including implementation of recommendations

Tax Director – Rubin and Katz, LLP, June 1999 to October 2001
- Prepare in depth estate plans for clients including implementation of recommendations
- Review income tax returns (individual, trust, partnership) for clients
- Manage the Tax Department including staffing to client assignments and development and implementation of a performance appraisal system for employees
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Estate Planning Consultant – Kisco Management Corp., November 1997 to June 1999
- Prepare in depth estate and gift tax plans
- Recommend strategies to preserve family assets for future generations
- Oversee income tax return preparation for 250 partnerships, S corporations, trusts, and individuals for a family office

Vice President- Estate Tax and Trust Accounting Departments, The Chase Manhattan Bank, July 1987 to October 1997
- Managed 2 departments of 25 individuals
- Oversaw pre and post mortem estate and income tax planning for 300 estates
- Discussed ways to save income and estate taxes, to maximize family net worth with clients and prospective clients
- Spoke to professional groups regarding estate and income tax planning techniques available to transfer wealth
- Presented tax planning seminars to customer groups
- Reviewed trust and estate accountings to assure compliance with states accounting requirements
- Lobbied with professional groups to effect changes in the tax laws

Assistant Vice President, Trust and Estate Division Tax Department, Bank of New York, August 1983 to July 1987
- Post mortem tax planning for estates where the Bank was executor
- Reviewed federal and state estate tax returns before filing with the various governmental agencies
- Reviewed all income tax returns for estates and related trusts
- Reviewed all personal income tax returns for clients of the bank
- Prepared performance appraisals, interviewed candidates for employment
- Reviewed all income tax withholding for the institutional pension accounts to assure compliance with the law

Tax Manager, New York Office Tax Department, KPMG Peat Marwick, September 1978 to August 1983

- Research and compliance related to corporate income tax accounts
- Preparation of personal income tax returns for clients

Senior Accountant, Munns and Dobbins, CPAs July 1974 to September 1978
Auditing and tax return preparation related to clients

EDUCATION

Iona College **MBA Taxation, June 1978**
Masters Thesis "Estate Planning for the Professional Accountant"
BBA Accounting, June 1974

Professional Presentations

- NYSSCPA Annual Estate Administration Conference
  Presentation, "State Income Taxation of Trusts, What Are the Rules"
- NYSSCPA Annual Estate Planning and Estate Administration Conference
  Co-Chairman, Rochester, NY
  Presentation, **"The Estate Accounting - Getting Started"**
- NYSSCPA Annual Conference, Toronto, Canada
  Presentation, **"Estate Planning for the Business Executive"**
- NYSSCPA Annual Administration Conference New York,
  Conference Chairman
- NYSSCPA Annual Tax Conference, Rochester and New York City,
  Presentation "New York State Personal Income Tax Update"

Community Service

- **Chairman of the Board,** Arthritis Foundation, Hudson Valley Branch **1998-2001**
- **Senior Vice Chair,** Arthritis Foundation, New York Chapter **1997-2003**
- **Board of Directors, Pius XII Youth and Family Services, 1998-2001**

Professional Memberships and Associations

- American Institute of Certified Public Accountants
- AICPA Tax Division –Former member of The Income of Estates, Trusts and Beneficiaries Committee
- New York State Society of Certified Public Accountants
- NYSSCPA Tax Division - Former Chairman of the Income of Estates and Trusts Committee
- Westchester Chapter NYSSCPA, Member Board of Directors
- American Bankers Association Tax Committee – Former Committee Member
  - Testified before the Internal Revenue Service in Washington, DC regarding the proposed regulations regarding the Generation Skipping Transfer Tax, April 1993
  - Former liaison from the American Bankers Association Tax Committee to the AICPA Tax Division
- Estate Planning Council of Westchester, Inc. - Former Member Board of Directors

References furnished upon request