



brown kaplan + liss LLP
CERTIFIED PUBLIC ACCOUNTANTS

NAME AND TITLE	SCOTT R. KAPLAN, CPA, PARTNER
EDUCATION AND AFFILIATIONS	<ul style="list-style-type: none">+ B.S. in Accounting from Indiana University+ Member American Institute of Certified Public Accountants+ Member Illinois CPA Society
PRIOR EMPLOYMENT	<ul style="list-style-type: none">+ Junior Accountant at Lester Witte & Company+ Senior Accountant at Altschuler, Melvoin & Glasser
AREAS OF KNOWLEDGE	<ul style="list-style-type: none">+ Accounting, Payroll and Sales Taxes+ Assurance Services<ul style="list-style-type: none">▪ Audits▪ Reviews▪ Compilations▪ Non-Traditional Engagements▪ Forecasts and Projections+ Income, Estate and Gift Taxes+ Strategic Planning+ Business Consulting+ Personal Financial Planning
AREAS OF PRACTICE	<ul style="list-style-type: none">+ Publishing+ Business-to-Business Service Providers+ Medical Practices+ Dental Practices+ Advertising and Marketing+ Wholesale and Distribution+ Real Estate Development+ Rental Real Estate+ Engineering and Architectural+ Manufacturers' Representatives+ Software Development+ Retail and Restaurants+ Manufacturing+ Not-for-profit Entities+ Individuals+ Estates+ Trusts
EXPERIENCE AND EXPERTISE	Manages a diversified practice of individuals, not-for-profit entities and family businesses in many industries. Thinks creatively and proactively to help clients meet their financial goals.

EXAMPLES OF SPECIAL ACCOMPLISHMENTS

- + Identified the opportunity for a client to convert from a C to an S corporation which ultimately resulted in the savings of several million dollars of income taxes on the sale of its business.
- + Assisted clients in selling their businesses at favorable terms and maximized after-tax proceeds.
- + Identified opportunities to convert taxable retirement accounts to non-taxable retirement accounts with minimal income tax consequences.
- + Identified opportunities for business owners to make pre-tax retirement contributions at little cost to cover employees.
- + Identified opportunities to utilize research and development credits to substantially reduce clients' income taxes.

CURRENT CHARITABLE AND CIVIC ACTIVITIES

- + Audit and Finance Committee Member Turning Point Behavioral Health Care Center
- + Board Member of Kevin Kaplan Foundation
- + Member Evanston Lighthouse Rotary Club

PAST CHARITABLE AND CIVIC ACTIVITIES

- + Treasurer Evanston Lighthouse Rotary Club
- + Board member Evanston Mental Health Association

Scott specializes in family owned businesses and helps them evaluate their financial health and provided sound practical advice to streamline their operations. This includes assisting them to evaluate and strategize for the transition of their business from one generation to the next. Scott is also the audit partner for BK+L's not for profit clients and works closely to help them comply with federal and state regulatory requirements.