



brown kaplan + liss LLP
CERTIFIED PUBLIC ACCOUNTANTS

NAME AND TITLE	JAMES P. PEPA, CPA, PARTNER
EDUCATION AND AFFILIATIONS	<ul style="list-style-type: none">+ B.S. in Business Administration, Accounting Major from University of Dayton+ Member American Institute of Certified Public Accountants+ Member Illinois CPA Society
PRIOR EMPLOYMENT	<ul style="list-style-type: none">+ Sole Practitioner, James P. Pepa , CPA+ Administrative Coordinator, New Warrior Chicago/ Mankind Project Chicago+ Senior Accountant, Maecorp Environmental Services, Inc.+ Senior Financial Analyst, Spiegel Inc.+ Internal Auditor, Spiegel Inc.+ Auditor, State of Ohio Auditor's Office
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
AREAS OF PRACTICE	<ul style="list-style-type: none">+ Publishing+ Business-to-Business Service Providers+ Medical Practices & Dental Practices+ Professional Service Providers+ Advertising and Marketing+ Real Estate Development+ Rental Real Estate+ Software Development+ Retail and Restaurants+ Not-for-profit Organizations+ Individuals+ Estates+ Trusts

EXPERIENCE AND EXPERTISE

Manages a diversified practice of individuals, non-for-profits organizations and privately held businesses in many different industries. Works creatively and proactively to help clients meet their financial goals, including relationship building.

EXAMPLES OF SPECIAL ACCOMPLISHMENTS

- + Has assisted many sole-proprietorships in understanding and taking advantage of the benefits of operating as a subchapter S corporation
- + Identified opportunities for business owners to make pre-tax retirement plan contributions for both themselves and their employees.
- + Assisted a client in converting from a C to an S corporation to minimize current corporate income taxes and minimize future potential capital gains.
- + Assisted a client in the acquisition and development of real estate in a way that provided opportunities to minimize income and capital gains taxes, including cost acquisition studies, and will provide for future tax saving opportunities via gifting of ownership interests.

RECENT ARTICLES AND PRESENTATIONS

- + Small Office Home Office, Evanston Chamber of Commerce- Accounting and Tax Issues
- + Pacific College of Oriental Medicine- Accounting and Tax Issues for Practitioners.

CURRENT CHARITABLE AND CIVIC ACTIVITIES

- + Treasurer, Evanston Soccer Association
- + Member, Evanston Chamber of Commerce Annual Golf Outing Committee

PAST CHARITABLE AND CIVIC ACTIVITIES

- + Treasurer, Mentors Action Network

In addition to managing his clients, Jim serves as Information Technology liaison at Brown, Kaplan + Liss LLP, working with outside professional service providers to ensure optimum performance and security. Jim brings a unique blend of technical and interpersonal skills to both his clients and his team members at the firm.