



Walter Primoff, CPA

DIRECTOR

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○ BIO

Mr. Primoff helps high-net-worth clients, advising on their family tax management, estate, and trust, closely held business and charitable planning affairs. He works with clients to resolve tax agency controversies and assists nonprofit organizations with tax and operational issues. As a trusted advisor, he helps clients build and coordinate their professional advisor teams, has served as an executor and is both a current and past trustee.

He is the former deputy executive director of the 30,000 member New York State Society of CPAs, where he led the Society's programs related to professional practice matters both with members, and in Albany and Washington. In that role, Mr. Primoff was instrumental in developing New York's LLC/LLP laws. Both Connecticut and New Jersey used this work to enact their LLC statutes.

○ EDUCATION

He earned a B.S. from New York University with a double major in accounting and economics and a Certificate from the University of Paris–Sorbonne.

○ AWARDS

- *CPA Journal* "Max Block" Award, New York State Society of CPA's

- American Institute of Certified Public Accountants, The *Tax Advisor* “Article of the Year” Award,

○ BUSINESS & PROFESSIONAL AFFILIATIONS

- Member, American Institute of Certified Public Accountants -Tax Section, Personal Financial Planning Section
- American Institute of Certified Public Accountants – Personal Financial Specialist
- Member, New York State Society of Certified Public Accountants- Estate Planning Committee, Relations with Internal Revenue Service Committee

○ COMMUNITY SERVICE

- Co-President, UJA/JCC, Greenwich, CT
- Trustee, Margaret Neubart Foundation
- Board Member, Audit Committee Chair, The New Jewish Home
- Board Member, Washington Square Music Festival