



# Allen Schaefer, CPA, MBA

TAX DIRECTOR

## CONTACT

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## BIO

As a Tax Director, Allen is responsible for providing tax technical expertise and advising on relevant federal and multistate tax issues and legislative developments impacting both financial services and non-financial services clients. Named as a 2021 recipient of the 40 Under 40 Emerging Leaders Award by the New York State Society of CPAs, Allen specializes in the taxation of asset managers, private equity firms, investment partnerships, real estate, technology firms, service providers, family offices, and high net worth individuals. Armed with both business and sector knowledge, Allen provides clients with a comprehensive assessment and service offering of federal and multistate tax and administrative issues that range from income & franchise tax, M&A work, nexus and apportionment determinations, employment tax, sales & use tax, excise taxes, tax controversy, and notices work.

His prior experience at a Big 4 accounting firm involved providing multistate tax expertise to Top 100 hedge fund, private equity, and lending institution clients. In addition, Allen often served as client representative for both businesses as well as individuals before all state and local tax authorities.

Prior to that, Allen served as a Group Chief within the NYC Department of Finance's Tax Audit & Enforcement Division where he supervised a team of tax auditors engaged in examining taxpayers' books and records to ensure compliance with NYC tax laws of several income and excise tax types. Further Allen led and negotiated tax settlements with large business and international taxpayers. Additionally, Allen processed Voluntary Disclosure Agreements.

## EDUCATION

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Allen is a Certified Public Accountant licensed in New York.

Allen received a Master of Business Administration degree in Finance and Real Estate from Baruch College's Zicklin School of Business and was a recipient of the Frances & Edward Murphy MBA Award.

Allen received a Bachelor of Science degree in Accounting and Finance from Brooklyn College and was a recipient of the Peter F. Vallone Academic Scholarship.

## BUSINESS & PROFESSIONAL AFFILIATION

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- Member, American Institute of Certified Public Accountants
- Member, New York State Society of Certified Public Accountants (NYSSCPA)
  - NY Multistate & Local Taxation Committee
  - Taxation of Financial Instruments and Transactions Committee
  - Taxation of Mergers, Acquisitions, Dispositions and Other Business Transactions Committee