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Jo Ann M. Koontz, CPA, J.D.

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Professional Associations/Memberships (please include any leadership roles).

- American Academy of Attorneys-CPAs (AAA-CPA) - 2018 President
- Florida Association of Attorney-CPAs
- The Florida Bar
- Sarasota County Bar Association – Former Chair of the Real Property, Probate and Trust Law Section
- Florida Institute of Certified Public Accountants

Career Highlights:

Over the course of my career, I have had the good fortune to work with a diverse group of clients in a variety of industries, to help achieve their business and financial objectives. Being dual licensed as attorney and CPA has allowed me to approach my client's issues from both the legal and tax perspective, keeping their strategies lean yet holistic and comprehensive. It has been extremely rewarding to see clients from the inception of their concept to the sale of the company for a multiple, some to another small business owner and some to publically traded companies. Our unique fabric of business clients due to our geographic location has afforded me the opportunity to work with C Suite executives in a relatively small town, but a robust business climate. I am grateful I have enjoyed a high level of complexity of transactions and clients not commonly found in smaller cities.

What are you doing to make a difference in the profession, your community, the world?

I am continually looking for opportunities to educate our clients and the public at large in general and about tax and business insight they may unaware of. I am a regular speaker at various Business Incubators locally, and conduct free weekly seminars in our office that are open to the public on a variety of tax and business

structure topics called “Our Open House”. Our firm donates time and supplies to a

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What do you see yourself doing professionally in 10 years.

I would like to be helping more of our corporate clients to create a business which is independent from them as the owner and more sustainable for their families and employees.

What accounting conferences do you normally attend?

American Academy of Attorneys-CPAs

What websites/magazines do you use to keep up on news of the accounting profession?

CCH Intelliconnect, *CPA Practice Advisor*, *Florida CPA Today* (FICPA)

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Accounting

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