

Five Star Accounting Professional Award

Carl Schwartz, CPA, MBA



RRBB Accountants and Advisors is proud to announce that Carl Schwartz, co-managing partner, has been named a 2015 NJ Five Star Accounting Professional, for the second straight year. Teaming with New Jersey Monthly magazine (January 2015) to announce it, Five Star Professional conducted research, with 10 or more areas of evaluation and eligibility, to determine the accounting professionals in New Jersey who are providing quality services to their clients. Less than 1% of the certified public accountants in the New Jersey area, made the list. We are happy to have such a distinguished award winner in our midst.

Carl had also been interviewed for and featured in NJ Biz newspaper (NJ Biz October 2014), for his extensive experience and expertise in Estate Planning and Gifting, especially as it relates to tax planning.

Carl serves as the head of the firm's Tax Department. With more than 30 years of experience in taxes and accounting, he specializes in estate and trust taxation, tax planning and preparation for high net worth individuals, as well as corporations and partnerships.

As a Registered Investment Adviser, and with expertise in hedge funds and other investments, Carl actively manages client investment accounts through our affiliate, RRBB Asset Management, LLC., clearing transactions through Charles Schwab & Company. He is also affiliated with several major investment firms in New Jersey, New York, and Florida, and has been a member of the firm's Executive Committee since 1996.

Carl has been an invited speaker for the New Jersey Realty Owners Association, the Maplewood Chamber of Commerce and various other organizations.



CERTIFICATIONS

- Certified Public Accountant, State of New Jersey and State of New York
- Registered Investment Adviser, State of New Jersey, State of New York and State of Massachusetts

EDUCATION

- Bachelor of Science in Accounting, Brooklyn College (Brooklyn, NY)
- MBA in Taxation, Baruch Graduate School (New York, NY)

PROFESSIONAL MEMBERSHIPS

- New Jersey Society of Certified Public Accountants (NJSCPA)
- American Institute of Certified Public Accountants (AICPA)



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