

# GLICK & ASSOCIATES

TAX PROFESSIONALS

## JEFFREY M. GLICK, CPA, MT

### Emphasis

Individual Taxation  
High Net Worth  
Mid to Upper Level Executives  
Closely Held or Family Owned Business  
Estate and Trust Taxation  
Tax Consulting



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### Profile

Fifteen years of experience in public accounting specializing in trust and estate tax, tax planning for high net worth individuals, mid to upper level executives and closely held business owners. Experience in assisting entrepreneurs build, grow, maintain, and pass on their ventures through pro-active business and tax planning.

### Education

Masters in Taxation - University of Denver  
BS/Accounting with Minor in Finance - University of Denver

### Professional/Community Involvement

6 Year Chair: California Society of CPAs - Estate and Personal  
Financial Planning Special Industry Group.  
Executive Board Member/ Finance Committee Chair: The Lake  
School  
Former Director / Treasurer: Boys Hope Girls Hope

### Interesting Fact

Before becoming a father in September 2007 and again in March 2009, I was an adventure traveler – visited 7 countries on 3 continents over the last 4 years. Travels have included hiking the Inca Trail, cave exploring with bats in an underground river, watching a volcano explode from less than 5 miles away, self-guided white water river rafting, powered hang gliding, and jumping from a 40 foot waterfall!