

## Darren Goldstein

PRINCIPAL

(212) 697-2299



**With a focus on small to midsize, owner-operated businesses, Darren Goldstein helps principals minimize entity tax liabilities and maximize wealth.**

Darren got his start in public accounting some 30 years ago, serving small, privately owned businesses. He's been at it ever since, working closely with owner-operated businesses in the real estate, advertising, medical, and hospitality sectors, among others.

A veteran CPA, he recognizes the importance of getting to know each client personally and gaining an understanding of their business and personal goals and challenges. In that way, he is able to tailor his advice to their specific needs. And this personal approach is why clients see Darren as a trusted adviser, one that always has their long-term interests in mind and is there to guide them when important financial decisions must be made.

Darren closely follows ever-changing federal, state, and local tax laws, always on the lookout for ways to help both new and established clients take full advantage of tax credits and the savings they provide. He is also an enthusiastic proponent of technology, in particular commercial accounting software like QuickBooks QuickBooks Online, Xero, Waveapp, Restaurant 365, and Microsoft Dynamics GP. In addition to helping clients choose the software best suited to their business, Darren often trains the client's accounting personnel in its use—all of which results in financial records that are much more accurate, and easier to access and analyze.

### Professional Affiliations

- American Institute of Certified Public Accountants (AICPA)
- New York State Society of Certified Public Accountants (NYSSCPA)

## Representative Experience

- Helped a software company qualify for the research and development tax credit, which saved it \$150,000 annually in income taxes. The company's management was unaware of the existence of this credit.
- Helped a financial management company reduce its audit assessment by more than 90 percent, thereby saving the client millions of tax dollars.
- Advised a 50-year-old manufacturing company in transitioning from its outdated accounting software to QuickBooks, and then trained the accounting staff on how to use it.
- Streamlined a local retailer's use of QuickBooks accounting software, and then trained employees on how to use it properly.
- Defended and resolved a number of issues brought against a financial service company by the New York State Department of Financial Services, which enabled the client to maintain his license to do business in the state.

## EDUCATION & CERTIFICATIONS

B.A., State University of New York College at Oswego (1990)

MBA, State University of New York at Buffalo (1992)

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## SERVICES

### TAX

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