

## Martin Berkowitz

PARTNER EMERITUS

(212) 697-2299



**When not-for-profit organizations, privately owned businesses, and individuals need exceptional tax and audit advice and services, they turn to Martin Berkowitz.**

Patient, knowledgeable and thorough, he works closely with clients on tax planning and tax return preparation, trusts and estates matters, and regarding individual tax liens. Year after year, clients rely on Martin to prepare their annual returns for the IRS and the New York State Department of Law. He assists clients in assessing and limiting their tax liability, conducts internal audits, and represents clients in IRS audits.

Starting at Lutz and Carr upon graduating from college, Martin has been with the firm for more than 40 years. During his tenure, he has developed a deep knowledge of and experience in advising individuals and companies across industries, from entertainment companies, theaters and artists to art galleries, consulting services, social services and member organizations, and others.

Martin serves as the treasurer of several organizations and in various volunteer positions in other ones.

### **Representative Experience**

- Guided a new nonprofit membership organization through the process of preparing the information needed for the annual tax returns. The client was heavily involved in its program and relied on Martin to manage tax implications for the organization.
- Assisted a computer security consulting business, at year-end and throughout the year in preparing meaningful accounts and tax returns, and in leveraging available tax credits and

deductions to their full advantage.

- Prepared tax returns for a music consultant and set up a corporation to shelter his income following Internal Revenue Service and New York State tax audits.

## EDUCATION & CERTIFICATIONS

Certified Public Accountant (New York, 1977)

B.A., Yeshiva University (1972)

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