Michael Wallace

PARTNER

Providing impeccable audit and tax preparation services for not-for-profit organizations, Mike Wallace navigates clients through the complex accounting requirements and ever-changing regulations within the not-for-profit world.

Forging and sustaining long-term relationships with each client, Mike gains a clear understanding of their missions, needs and concerns. He goes well beyond the standard audit and tax preparation services. Serving as a trusted adviser and sounding board, he guides clients throughout the year, advising on specific issues that affect them in their everyday work and addressing their significant concerns about securing funding for their organizations. Known for being exceptionally organized, Mike works closely with each client gathering the required financial-related information, preparing financial documentation, and crafting a plan to help them meet their funding deadlines, even in the tightest timeframes.

Clients consider Mike knowledgeable, relatable and, easy to work with They appreciate his flexibility, concern and understanding of their needs. Mike's reliability, accessibility and responsiveness leave organizations feeling as if they have an in-house adviser at their disposal whenever questions or issues arise.

At Lutz and Carr, Mike is responsible for new staff member training and professional development and is involved in educating all accounting staff on current standards and practices.

Professional Affiliations

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

EDUCATION & CERTIFICATIONS

Certified Public Accountant (New York, 2002)

B.A., Pace University (1994)

SERVICES

NOT-FOR-PROFIT AUDIT