

# James G. McGrory, CPA, MT

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Jim has been a tax professional in public accounting for more than 25 years. He provides tax compliance, accounting, and tax consulting services to a broad base of clients including high-net-worth individuals and their families, closely held businesses and their owners, partnerships, S corporations, estates and trusts, and private foundations.

Jim has worked with business clients in a wide range of industries, including professional service firms, rental real estate, and investment holding & management companies.

In addition to specializing in tax return preparation and review services, Jim has assisted clients with the purchase and sale of businesses, representation in IRS and state audits, foreign bank account reporting, and complex private foundation tax issues.

Prior to joining D&S in 1995, Jim was a tax manager in the Philadelphia office of Coopers & Lybrand, where he started his career. While there, Jim was a member of the firm's personal financial services, exempt organizations, and mutual funds groups, where his clients included public company executives, private foundations, and regulated investment companies.

Jim received a Bachelor of Science degree in business administration with maxima cum laude honors from LaSalle University, where he majored in finance and accounting. He also earned a Master of Taxation degree from the Villanova Law School Graduate Tax Program.

He has continued to supplement his education with a variety of professional education courses and is a presenter for in-house training. Jim has also presented as a co-host of Money Matters TV, a locally-produced cable television program about personal finances and business issues.

Jim is a member of the American Institute of Certified Public Accountants, as well as the Pennsylvania Institute of Certified Public Accountants, where he previously served on the Greater Philadelphia Chapter Executive Committee, and as co-chair of the Greater Philadelphia Chapter Practitioners Committee.

In 2010, Jim was honored with the Michael A. DeAngelis Award from LaSalle University's Accounting Department—its highest honor.

Jim resides with his wife and children in Ardsley, Abington Township, Pennsylvania. His community involvement has included leadership positions with the Boy Scouts and volunteer work at his church. Jim's interests include movie and game nights with his family, as well as touring the Greater Philadelphia area.