



Jean E. Whitford
CPA, CGMA

Tax Manager

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Bachelor of Arts
 (Accounting)
 Wittenberg University

Industries Served:

Family Offices
 Real Estate

Associations:

AICPA, OSCPA

*Chartered Global Management
 Accountant*

Licensed in Ohio, New Jersey

Jean Whitford is an accomplished tax manager with more than 30 years of accounting experience. For the last 12 years, she has focused specifically on the area of tax services. Her most recent experience has focused on service to family offices, and closely held businesses and clients in the real estate industry.

Immediately prior to joining Decosimo in 2010, Jean served as the in-house tax manager for a significant family office operation. As such, she was responsible for all individual, trust, and gift tax returns for the family, preparing numerous partnership, corporate, non-profit, personal property and sales tax returns for entities where a controlling interest was owned.

Jean's service to family offices has also included tax research and planning for various closely held entities, non-profits, trusts and individuals, preparing specifically requested financial statements for banks, navigating payroll tax issues and other special projects. She has represented clients before the Internal Revenue Service, as well as other state and local tax authorities. Jean also has experience with donations of conservation easements and business aviation tax issues.

Jean is a certified public accountant licensed in Ohio and New Jersey. She is a member of the American Institute of Certified Public Accountants (AICPA) and its tax section, and the Ohio Society of Certified Public Accountants (OSCPA). Jean is a graduate of Wittenberg University with a Bachelor of Arts degree in Accounting.

She is also involved with the West Clermont International Baccalaureate Advocacy Group, volunteers with the West Clermont School District PTO's and participates in the All Saints Handbell Choir.