

PROFILE



David S. Berezin, CPA, AEP®
Principal

PROFILE

AREAS OF EXPERTISE

Individual and Business Tax
Planning and Compliance
Business Accounting and
Reporting (Income Tax Basis)
Accounting Systems and New
Business Startups
International Tax Compliance
and Planning – Individuals
and Businesses
Trusts and Estate Tax
Planning and Compliance
Family Limited Partnerships
Gift and Generation-Skipping
Transfer Tax
Fiduciary and Guardianship
Accountings
Charitable Trusts
Tax Exempt Organization Tax
Planning and Compliance

KEY CLIENTS

Professional Service
Businesses
High Net Worth Businesses
and Individuals
Estates and Trusts
Tax Exempt Organizations

EDUCATION

Bachelor of Science,
Accounting, Florida State
University

David S. Berezin

David S. Berezin brings more than 25 years of professional accounting and tax experience to his role as Principal of Berezin, CPA, P.A., a tax and accounting practice located in South Miami, Florida. Mr. Berezin's experience includes 12 years at two of the largest CPA firms in Florida, where he concentrated his efforts in the practice of estate, gift and trust planning and compliance, and complex individual and business tax compliance and planning.

Mr. Berezin currently leads a tax and accounting practice serving high net worth businesses and individuals. He focuses more of his efforts as an outsourced CFO and tax department head for small and medium sized companies and in the area of individual income taxation compliance, planning and research. Mr. Berezin also brings his considerable experience in the area of estates, gifts and trusts to assist clients with planning and implementing estate, gift and trust planning strategies. In addition, Mr. Berezin assists with many international tax related matters for individuals, businesses and trusts. The firm's clients include successful professional services practices, as well as multi-state and international tax clients. Mr. Berezin has extensive experience with fiduciary accountings, and has served as a consultant numerous times in litigation matters concerning estate and trust, tax and accounting related matters. Mr. Berezin has lectured extensively on accounting, income tax, and estate, gift and trust topics.

Mr. Berezin is a member of the American Institute of Certified Public Accountants (Tax Section) and Florida Institute of Certified Public Accountants and is a Past President and current member of the Estate Planning Council of Greater Miami. He received his B.S. degree in accounting from Florida State University and holds his CPA license in Florida. He is also an Accredited Estate Planner (AEP®), a graduate degree level designation issued by the National Association of Estate Planners & Councils.

Professional & Civic Affiliations

American Institute of Certified Public Accountants (AICPA)
Florida Institute of Certified Public Accountants (FICPA)
Estate Planning Council of Greater Miami (Past President)

Recent Seminars & Lectures

- Federal Fiduciary Income Tax Workshop (Halfmoon Seminars, November 2018), Seminar Co-Leader
- Reviewing Fiduciary Income Tax Returns (Florida Institute of CPAs, December 2012), Seminar Leader
- Income Tax Issues in Trust and Estate Administration (Estate Planning Council of Greater Miami, October 2011), Seminar Leader
- The Tax Implications of Generation-Skipping Techniques: Planning to Minimize the GST Tax (Lorman Educational Services, July 2011 and June 2009), Seminar Leader

BEREZIN, CPA, P.A.

7900 SW 57th Avenue, Suite 11, Miami FL 33143
Tel : 305.661.2877 Fax : 305.661.4012
Website: www.berezincpa.com