

160 Federal Street, 9th Floor  
Boston, MA 02110

TEL: 617-227-6161  
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[edelsteincpa.com](http://edelsteincpa.com)



Emily W. Matthews CPA  
*Partner*

Call: 617-478-3446 | Email: [ematthews@edelsteincpa.com](mailto:ematthews@edelsteincpa.com)

#### MEET EMILY

Emily is an experienced professional who provides sophisticated tax compliance and advisory services to closely-held businesses, their owners and other high net worth individuals. Clients value her ability to explain highly technical concepts in terms they can understand and to frame solutions so they can make informed decisions and act quickly and confidently.

Emily's clients receive tailored, results-driven tax planning strategies that save them time, energy and financial resources. They know that they can count on her to respond promptly and effectively, whatever the service she is providing:

- Overseeing tax compliance
- Advising on estate and wealth planning
- Analyzing financial statements
- Preparing projections or
- Making recommendations about a transaction

With Emily's help, clients can rest easy knowing they are in compliance with federal, state and local tax requirements and have minimized their tax liability.

#### BACKGROUND

Emily began her career in public accounting in 2006. Her early career provided her experience with audit, advisory, and tax services. Today, Emily focuses her practice on helping growing businesses and affluent individuals and families with tax planning and compliance, as well as consulting matters.

#### HOW EMILY CAN HELP

- Develop strategies to minimize tax liability
- Advise clients how to properly account for transactions
- Provide effective tax planning for individuals and businesses
- Represent clients in IRS and state tax audits
- Analyze business transactions, including M&A modeling and guidance

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## RESULTS

- Section 1202 application to stock sales, excluding up to 100% of gain from taxation
- Advised multiple clients through process of acquisition
- Represented multiple clients in both federal and state audits with favorable results
- Successfully resolved an estate neglected for ten years and under investigation by the IRS

## OUTSIDE THE OFFICE

After work, I enjoy spending time with my family, cooking, and staying active.

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## EDUCATION

Bachelor of Science in Business and Professional Accounting, University of Vermont

## PROFESSIONAL AFFILIATIONS

American Institute of Certified Public Accountants (AICPA)

Massachusetts Society of Certified Public Accountants (MSCPA)

Boston Estate Planning Council (BEPC)

## COMMUNITY SERVICE

Raising a Reader, 501(c)(3), Emerging Leader, Boston, Massachusetts, 2013-2016

Good Neighbor Health Clinic, 501(c)(3), Board of Directors, Treasurer, White River Junction, Vermont, 2012