160 Federal Street, 9th Floor
Boston, MA 02110

TEL. 617-227-6161
FAX: 617-589-0530

edelsteincpa.com

edelstein
accounting for you

Michael Barbera CPA, CGMA

Partner

Call: 617-478-3476 | Email: mbarbera@edelsteincpa.com

MEET MICHAEL

For over twenty years, Michael has advised multi-million dollar, privately-held business entities and their owners on complex federal, state and local tax issues. He helps large, multi-state and international flow-through entities, large C-Corporations, high net-worth individuals and other clients with planning and compliance. In addition to his specialized flow-through taxation skill set, Michael has deep, broad experience dealing with state and local tax issues.

Michael's experience includes:

- Private-equity buy-ins and buy-outs
- Federal and state tax compliance and
- State and local sales and use tax
- Real estate transactions

Clients from software, high-tech, real estate, the legal services sector, private equity/hedge funds and investment partnerships have sought Michael's counsel and assistance over the years. He also handles certain aspects of international compliance.

BACKGROUND

Prior to joining Edelstein in 2008, Michael started his accounting career as a Tax Manager at Brown & Brown, LLP, which later merged with UHY Advisors. Today, Michael is a Partner on Edelstein's Tax Team, focusing on tax compliance for high net worth and privately-owned business clients.

In addition, Michael is a technology champion at Edelstein. He regularly teaches his colleagues about the firm's various software programs to help them be more efficient and productive. He led the effort to standardize the work papers and process for C corporations, S corporations and Partnerships). Before he helped Edelstein with their paperless office, Michael did the same at Brown & Brown, LLP.

HOW MIKE CAN HELP

Specialties: Corporations, Flow-through (S-Corp & partnership), LLC taxation, High net worth individuals

- Facilitate 1031 exchanges
- Assist with step-up and step-down transactions

160 Federal Street, 9th Floor
Boston, MA 02110

TEL. 617-227-6161
FAX: 617-589-0530

edelsteincpa.com

edelstein
accounting for you

- Analyze tax consequences of contribution of appreciated property to partnerships
- Evaluate state and local taxation liability based on state nexus footprint and apportionment
- Advise on sales and use tax compliance
- Advise on tax planning for high net worth individuals and businesses
- Prepare composite filings
- Real estate transactions

RESULTS

- Successfully calculated the cost of sale and tax liability of the members of a $100 million technical staffing LLC during a buy-in/buy-out to a private venture capital firm; facilitated the transaction
- Calculated sale transactions for $180 million buy-out to Goldman Sachs
- Successfully represented clients in state and federal tax examinations.

OUTSIDE THE OFFICE

Bourbon Enthusiast

EDUCATION

Bachelor of Science in Business Administration with a concentration in Accounting, Northeastern University

PROFESSIONAL AFFILIATIONS

American Institute of Certified Public Accountants (AICPA)

Massachusetts Society of Certified Public Accountants (MassCPAs)