**Accountants, Tax Preparers, Bookkeepers and Auditors**

**Referrals From Nancy Fallon-Houle, P.C.**

[nfallon@nfhlaw.com](mailto:nfallon@nfhlaw.com) 630-963-0439 x 22

Revised 2-15-11

**Please see Yellow Highlights for the Type of Accounting, Tax or Auditing Work You Need**

| **Accountant & Firm** | **Type of Work** | **Firm Size** |
| --- | --- | --- |
| **Tax Advice and Tax Return Prep for Start-Ups, Small to Mid-Sized Businesses, Individuals:** | | |
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| **Mark W. Mirsky, CPA, MST**  **ROI Business Services, LLC**  798 W. Bartlett Road  Bartlett, IL 60103-4482  630-855-5787 (main); 630-855-5638 (direct); 630-302-6775 (cell); 630-855-1239 (fax)  [mmirsky@roibusinessservices.com](mailto:mmirsky@roibusinessservices.com" \o "mailto:m_mirsky@comcast.net)  [www.roibusinessservices.com](http://www.roibusinessservices.com/" \o "http://www.roibusinessservices.com/) | Startups: Accounting & Entity Planning  Small & Midsized Business tax & accounting; Business Tax Returns; Individual tax; Multi-state taxation (sales tax and income tax); Outsourced Controllership; LLC and Partnership Agreements – Tax Sections and Tax Issues; tax issues related to transactions. | 9 |
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| ***Catherine Riddick***  Xponent Group  521 S. LaGrange Rd., Suite 103  LaGrange, IL 60525  708-352-7377; 708-352-5233 (fax)  [***www.xponentgroup.com***](http://www.xponentgroup.com) | Startups: Accounting and Entity Planning  Small & Midsized Business tax & accounting; Business Tax Returns; Individual tax returns and advice. | 5 |
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| ***Bill Piotrowski or Gary Gebis***  Piotrowski & Gebis, CPAs  3315 Algonquin Rd., Suite 300  Rolling Meadows, IL 60008  847-259-1900; Fax: 847-259-2016  [wpiotrowski@piogeb.com](mailto:wpiotrowski@piogeb.com) | Startups: Accounting & Audits; Entity planning; Small Business; Not For Profits Accounting (not Audits); Tax & Accounting for Professional Service Providers (Drs. and Lawyers); Individual Tax; Corporate / Entity Tax; corporate dissolutions | 6 |
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| **John T. Grebe**  Grebe & Associates PC  1749 S. Naperville Rd., #203  Wheaton, IL 60189  (630) 653-3510  [jtgrebe@grebeassoc.com](mailto:jtgrebe@grebeassoc.com) | Startups: Business accounting, small business accounting, and tax. |  |
| ***Barbara J. Vondra, CPA***  7702 S. Cass Avenue, Suite 135  Darien, IL 60561  630-327-8202; Fax: 630-810-1984  [Topinky1@aol.com](mailto:Topinky1@aol.com) | Personal & Small Business Services; QuickBooks, Bookkeeping, Budget Tracking, Tax Preparation, Seminars |  |
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| ***Jim Kaczkowski***  Kaczkowski & Associates  1607 Taft Avenue  Wheaton IL 60187  630-510-9540  [jameskaczkowski@juno.com](mailto:jameskaczkowski@juno.com) | Startups: Accounting  Small Business tax and accounting  Corporate / Entity Tax  Individual tax | 2 |
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| ***Ronald A. Rindone***  Rindone and Company  180 W. Park Avenue Ste 155 Elmhurst, IL 60126  ronrindone@sbcglobal.net  (630) 279-1400 | Start Ups, Small and Mid-sized businesses  Business Tax Returns and the tax returns for business owners. | 2 |
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| ***Mike Ramirez***  Michael I. Ramirez  440 W. Boughton Road  Bolingbrook, IL 60440-1892  630-759-7773  [mike@ramirezcpa.com](mailto:mike@ramirezcpa.com) | Startups: Accounting  Small Business tax and accounting  Corporate / Entity Tax, entity structure; Individual tax; business tax returns | 2 |
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| ***Porte Brown & Co***  **Bruce Jones,** Managing Partner  845 Oakton Street,  Elk Grove Village, IL  (847) 956-1040  [bgj@portebrown.com](mailto:bgj@portebrown.com)  [www.portebrown.com](http://www.portebrown.com)    Kimberly M. Hollingshead  Accountant  Porte Brown LLC  845 Oakton Street  Elk Grove Village, IL 60007  Tel: 847-956-1040  Fax: 847-956-6780  Email: kmh@portebrown.com  Please visit our website: [www.portebrown.com](http://www.portebrown.com/) | Tax Planning and Preparation of Small Business, Midsized Business and Middle Market Business; Audits of financial statements, private placement audits, M & A tax and accounting, transactional tax advice and planning; valuations; estates and trust  Periodic accounting, Tax Returns, Quick Books, Payroll Tax and Employer Tax, Tax planning | 35  Accountants  8 staff |
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| ***Gregory Loberg, C.P.A.***  ***Loberg, Miki & Associates, LLP***  **202A Campbell Street**  **Geneva, IL 60134**  **phone -** 630-845-0027  **fax** 630-845-0029  [**greg@lobergmiki.com**](mailto:greg@lobergmiki.com) | Small business tax and accounting, bookkeeping, payroll, sales tax, financial statements, tax advisor to transactions, projections. |  |
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| ***Bob Krone***  Frank L. Sassetti & Co, CPAs  6611 West North Avenue  ***Oak Park***, Illinois 60302  (708) 386-1433 x131  [krone@flsassetti.com](mailto:krone@flsassetti.com)  [www.flsassetti.com](http://www.flsassetti.com) | Small Businesses / Family-Owned Businesses; Corporate / Entity Tax / Individuals; QuickBooks set up, data entry & Services; Start Ups: Accounting & Audits  Not-For-Profits Accounting & Auditing  SEC Accounting / Audits for Small Public Issuers | 14 |
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| ***Robert Lewin***  Robert H. Lewin, Ltd.  401 Huehl Rd. Suite 2C  Northbrook, Illinois 60062  (847) 982-1040  [robtlewin@aol.com](mailto:robtlewin@aol.com) | Small business tax and accounting. | 4 |
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| **Bookkeeping and Payroll Services (No Tax Returns):** | | |
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| **Ackerman Small Business Consulting**  **Alene Ackerman**  1204 Chesham Court  Woodridge, IL 60517  (847) 337-3370  [aleneackerman@comcast.net](mailto:aleneackerman@comcast.net) | Accounting, Bookkeeping, Payroll and Payroll Taxes, Consulting, IT Training, Business Support Services, Basic Website Maintenance and Design |  |
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| **Shirley Fancher, President**  Advantage Bookkeeping Professionals, Inc.  1700 Park Street, Suite 111  Naperville, IL 60563  630-416-0300  [shirley@advantagebp.com](mailto:shirley@advantagebp.com)  *Our law firm uses this firm.* | QuickBooks & Payroll Specialists: Payroll, EFT Payroll tax deposits; paychecks direct deposited, payroll tax returns & reports; Bookkeeping; invoicing; bill payment; bank reconciliations; financial statements; sales tax reporting; data reconstruction; Financial statement & operations analysis; collections.  Very reasonable rates for payroll preparation and payroll tax returns. | 12 |
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| **Susan Deal, Partner & Owner**  **Beyond Bookkeepers, Inc.**  100 Tower Drive, #119  Burr Ridge, IL 60527  susan@beyondbookkeepers.com  630-214-1268, x 4148  630-590-3734 fax  708-476-7124 cell | Payroll, payroll tax deposits and payroll returns, electronic paycheck processing, electronic deposit processing; Bookkeeping, QuickBooks set-up, QuickBooks entries, bank reconciliations, bill payment, invoicing, sales tax reports; general ledger review, financial statement analysis. *Prefers mid-sized to large-sized companies, preferred client spends about $3,000 per month on bookkeeping services.* | 4 |
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| **Transactional Tax Advice and Planning, in Addition to Tax Returns:** | | |
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| **Mark W. Mirsky, CPA, MST**  **ROI Business Services, LLC**  838 Tallgrass Drive  Bartlett, IL 60103-5083  630-302-6775; 630-855-1239 (fax)  [mmirsky@roibusinessservices.com](mailto:mmirsky@roibusinessservices.com)  [www.roibusinessservices.com](http://www.roibusinessservices.com/) | Startups: Accounting and Entity Planning  Small and Midsized Business tax and accounting; Business Tax Returns  Individual tax; Multi-state tax issues; Outsourced Controllership  LLC and Partnership Agreements – Tax Sections and Tax Issues | 2 |
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| ***Porte Brown & Co.***  **Bruce Jones,** Managing Partner  845 Oakton Street,  Elk Grove Village, IL  (847) 956-1040  [bgj@portebrown.com](mailto:bgj@portebrown.com)  [www.portebrown.com](http://www.portebrown.com) | Tax Planning and Preparation of Small Business, Midsized Business and Middle Market Business; Audits of financial statements, private placement audits, M & A tax and accounting, transactional tax advice and planning and LLC and Partnership Agreements; Business valuations; estates and trusts | 35  Accountants  8 staff |
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| **Mary Beth Moran, CPA**  **Kirkby, Phelan & Associates**  Aurora, IL  Securities through Linsco Private Ledger  Member NASD, SIPC  mmoran@kirkby.com  (630) 582-2345  [www.kirkby.com](http://www.kirkby.com) | Complex tax and accounting needs of growing businesses and individuals. Tax preparation, accounting service, preparation of financial statements, tax planning, advice on decisions that will affect business's future; LLC and Partnership Agreement Sections and Transactions; business succession planning; retirement plan development; financial management; Payroll management, full range of business needs, personal tax preparation.  Two sister companies, [Kirkby, Phelan & Associates CPA](http://www.kirkby.com/cpa/about_kcpa.html) and [Kirkby, Phelan & Associates Financial Resources](http://www.kirkby.com/fr_filter.html), assist clients in achieving their financial & accounting goals. | 11 employees total:  6 partners  5 accountants and staff |
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| ***Donald McGreal, CPA*** (new businesses and due diligence for acquisitions are his forte)  **McGreal Johnson & McGrane**  5740 West 95th Street  Oak Lawn, IL 60453  (708) 422-8600 (Phone)  (708) 422-8642 (Fax)  [mmcgrane@mcgreal.com](mailto:mmcgrane@mcgreal.com) | Small business, individuals (1300 returns per year); Many dental practices, attorneys.  Corporate tax work for builders and construction companies.  Not for profits (audits)  State audits as contract auditors  Trust and Estate Returns  Partners $125 to $150.  Business due diligence for acquisitions | 15 accountants  3 admin start |
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| **Interim CFOs for Small and Mid-Sized Businesses:** | | |
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| ***David Wise (Hinsdale)***  ***Dirk Landis (Chicago)***  ***Byron Hill (Michigan)***  Tatum CFO Partners, LLP  125 South Wacker Drive  Suite 300, PMB 3042  Chicago, Illinois 60606  (888) 596-5706; (630) 789-1531  [www.tatumcfo.com](http://www.tatumcfo.com) | Interim, Temporary or part-time CFO for small to mid-sized businesses who need a CFO but who can’t afford one full time.  Suburban and Chicago partners | 100 |
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| **Mid-Sized Business Tax Accounting Firms:** | | |
| ***Steve Ferrara***  **BDO Seidman & Co., CPAs**  Head of Audit Practice  233 N. Michigan Avenue  Suite 2500  Chicago, Illinois 60601  312-856-9100  [sferrara@bdo.com](mailto:sferrara@bdo.com)  Direct -312-616-4683 | 5th largest firm in world  Middle market entrepreneurs, startups, to $250 million, most clients range between the $25 million to $100 million range; Audited financial statements for private placements and small public offerings under Regulation A and SCOR (Reg D 504); SEC public reporting practice also in Chicago. -Hedge fund practice in New York. | 125 accountants  2000 US employees |
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| ***Porte Brown & Co***  **Bruce Jones,** Managing Partner  845 Oakton Street,  Elk Grove Village, IL  (847) 956-1040  [bgj@portebrown.com](mailto:bgj@portebrown.com)  [www.portebrown.com](http://www.portebrown.com) | Tax Planning and Preparation of Small Business, Midsized Business and Middle Market Business; Audits of financial statements, private placement audits, M & A tax and accounting, transactional tax advice and planning; valuations; estates and trust | 35  Accountants  8 staff |
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| **Hedge Fund/ Futures Fund Accountants:** | | |
| ***Michael J. Liccar***  Michael J. Liccar & Company  (also Paul McFarland)  53 West Jackson Boulevard  Suite 1250  ***Chicago***, Illinois 60604  (312) 922-6601; 312-922-0315 fax  [MLiccar@liccar.com](mailto:MLiccar@liccar.com)  [www.liccar.com](http://www.liccar.com)  Tommy Samuels, assistant | Hedge & Futures Fund Accounting and Auditing, Capital Account Allocations and tax work for funds; Broker-Dealers, JBOs, FCMs, IBs; Monthly accounting, compilation work,  Track records, Registered IAs, offshore accounting; Proprietary system for fund accounting; Outsources the Software: Advent on securities side and Eclipse on futures side;  Can do Re-pricing portfolio (but not out-trades). Some Real Estate Investment Funds. | 20 |
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| ***Eddie Chez***  Schultz & Chez  141 West Jackson Boulevard  Suite 2900  **Chicago**, Illinois 60604  (312) 583-7035  [eddiechez@schultzchez.com](mailto:eddiechez@schultzchez.com) | Funds and trader’s tax & financial adviser (2/3 of clients)  Professionals (Drs, lawyers, architects); construction, investments in buildings and shopping centers; Individuals investing;  Portfolio management for high net worth individuals; Family office and fund accounting; Audits of funds | 14  (8 CPAs) |
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| ***Phil Ryan*** |  |  |
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| ***Maurice Berkower***  Acquavella Chiarelli Shuster, Berkower & Co., LLP And  **ACSB Sandler, LLP**  517 Route 1 - Suite 1002  Iselin, NJ 08830  732-855-9600 Ext 23  [Mb@Acsbco.Com](mailto:mb@acsbco.com)  [Maurice@Acsaccounting.Com](mailto:maurice@acsaccounting.com) | Provides professional audit, tax, accounting and consulting services to approximately 150 investment partnerships, funds, offshore funds, securities broker-dealers, and registered investment advisors throughout the U.S. and in Cayman Islands. Offices in Needham, MA, New York City, Iselin, New Jersey, and Cayman Islands. |  |
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| ***Russell (“Rusty”) Fleming***  Fleming Financial Services, P.C.  1801 Falstaff Court  ***Bel Air, Maryland*** 21015  (410) 803-9211  [rfleming-1@comcast.net](mailto:rfleming-1@comcast.net) | Hedge and Futures Fund Accounting and CFO-Like Financial Service, Capital Account Allocations for funds. | 3 |
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| ***Nav Gupta***  NAV Consulting, Inc.  2221 Camden Court  Suite 330  ***Oak Brook***, Illinois 60523  312-786-1919; 630- 954-1919  [main@navconsulting.net](mailto:main@navconsulting.net) | Hedge and Futures Fund Accounting, Capital Account Allocations for funds.  Former turtles | 6 |
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| **Trader’s Tax Accountant / Tax Lawyer / Financial Adviser:** | | |
| ***Eddie Chez***  Schultz & Chez  141 West Jackson Boulevard  Suite 2900  **Chicago**, Illinois 60604  (312) 583-7035  [eddiechez@schultzchez.com](mailto:eddiechez@schultzchez.com) | Trader’s tax & financial adviser (2/3 of clients)  Professionals (Drs, lawyers, architects); construction, investments in buildings and shopping centers; Individuals investing;  Portfolio management for high net worth individuals; Family office and fund accounting; Audits of funds | 14  (8 CPAs) |
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| ***Michael J. Liccar***  Michael J. Liccar & Company  (also Paul McFarland)  53 West Jackson Boulevard  Suite 1250  ***Chicago***, Illinois 60604  (312) 922-6601;(312) 922-0315 fax  [MLiccar@liccar.com](mailto:MLiccar@liccar.com)  [www.liccar.com](http://www.liccar.com)  Tommy Samuels, assistant | Hedge & Futures Fund Accounting and Auditing, Capital Account Allocations and tax work for funds; Broker-Dealers, JBOs, FCMs, IBs; Monthly accounting, compilation work,  Track records, Registered IAs, offshore accounting; Proprietary system for fund accounting; Outsources the Software: Advent on securities side and Eclipse on futures side;  Can do Re-pricing portfolio (but not out-trades). Some Real Estate Investment Funds. | 20 |
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| **Fund Auditors and Tax:** | | |
| ***Lynne Tracer Weil***  Partner, Financial Services Industry  McGladrey & Pullen  Formerly: American Express Tax & Business Services;  Formerly Altschuler Melvoin & Glasser  Formerly: Checkers, Simon and Rosner  1 South Wacker Drive; Suite 800  Chicago, IL, 60606  (312) 634-4568  [lynne.weil@mcgladrey.com](mailto:lynne.weil@mcgladrey.com)  ***Mark Gaines,*** Partner  **Simon Lesser**, Partner | Hedge & Futures Fund Auditing and Tax  Hedge & Futures Fund Accounting  Not For Profit Accounting and Tax  Full Service Large Accounting Firm  Start-Ups through their other partners in firm  Start Ups and Small Business (but note that this is a large accounting firm with higher rates) | Small Fund Unit of 100 accountants in Chicago, very well regarded,  Several thousand in parent company |
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| ***Michael J. Liccar***  Michael J. Liccar & Company  (also Paul McFarland)  53 West Jackson Boulevard  Suite 1250  ***Chicago***, Illinois 60604  (312) 922-6601  (312) 922-0315 fax  [MLiccar@liccar.com](mailto:MLiccar@liccar.com)  [www.liccar.com](http://www.liccar.com)  Tommy Samuels, assistant | Hedge & Futures Fund Accounting, Fund Administration (and some Auditing), Capital Account Allocations and tax work for funds; Broker-Dealers, JBOs, FCMs, IBs; Monthly accounting, Focus reports, compilation work,  Track records, Registered IAs, offshore accounting; Proprietary system for fund accounting; Outsourcers the Software: Advent on securities side and Eclipse on futures side;  Can act as a qualified custodian. Liccar Securities for fund-of-fund RIA  Can do Re-pricing portfolio (but not out-trades). Some Real Estate Investment Funds. | 20 |
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| ***Maurice Berkower***  Acquavella Chiarelli Shuster, Berkower & Co., LLP And  **ACSB Sandler, LLP**  517 Route 1 - Suite 1002  Iselin, NJ 08830  732-855-9600 Ext 23 Or  [Mb@Acsbco.Com](mailto:mb@acsbco.com)  [Maurice@Acsaccounting.Com](mailto:maurice@acsaccounting.com) | Provides professional audit, tax, accounting and consulting services to approximately 150 investment partnerships, funds, offshore funds, securities broker-dealers, and registered investment advisors throughout the U.S. and in Cayman Islands. Offices in Needham, MA, New York City, Iselin, New Jersey, and Cayman Islands. |  |
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| ***Eddie Chez***  Schultz & Chez  141 West Jackson Boulevard  Suite 2900  **Chicago**, Illinois 60604  (312) 583-7035  [eddiechez@schultzchez.com](mailto:eddiechez@schultzchez.com) | Hedge & Futures Fund Auditing  Trader Accounting and Tax Work | 14  (8 CPAs) |
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| ***Porte Brown & Co***  **Bruce Jones,** Managing Partner  845 Oakton Street,  Elk Grove Village, IL  (847) 956-1040  [bgj@portebrown.com](mailto:bgj@portebrown.com)  [www.portebrown.com](http://www.portebrown.com) | Tax Planning and Preparation of Small Business, Midsized Business and Middle Market Business; Audits of financial statements, private placement audits, M & A tax and accounting, transactional tax advice and planning; valuations; estates and trust | 35  Accountants  8 staff |
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Attorney, Accountant, Banker and Insurance Referrals\Accountant and Auditor Referrals From Nancy Fallon-Houle.doc