

MICHAEL J. ZINSKY, CPA

10625 Shilling Road Frankfort, IL 60423

SUMMARY

Accomplished professional with over 17 years of broad based tax experience with a specific focus on high net worth individuals, estate and income tax planning as well as wealth and investment portfolio planning. Exceptional leader and effective team player skilled at implementing innovative strategies to enhance performance, meet or surpass financial objectives, and drive profitable growth. Proficient communicator with the ability to motivate and lead, improving efficiency and bringing value to the organization.

AREAS OF EXPERTISE

Taxation & Compliance – Estate & Income Tax Planning – Wealth & Investment Portfolio Planning - Relationship Management
Strategic Thinking - Risk Management – Business Acumen – Communication - Project Management – Leadership & Mentoring

PROFESSIONAL EXPERIENCE

PANDUIT CORP., TINLEY PARK, IL

2010 to Present

FAMILY OFFICE DIRECTOR

Oversaw all aspects of a multi-generational family office including income, wealth, and estate tax planning, payroll, budgeting and financial reporting for approximately three dozen adult family members. Worked collaboratively with outside service providers to ensure the needs and goals of the family were met. Worked with family office staff of ten to manage various investment portfolios, prepare security research reports and train staff and family members regarding investment strategies. Worked closely with key personnel of the family owned operating company to evaluate and plan for taxes and other operational drivers. Implemented best practices within the family office including enhanced governance procedures.

Selected Accomplishments:

- Designed and developed a secure family website to provide 24 hour access to important financial and personal information
- Instrumental in the transition of firm and family office functions from the First to Second and Third generations
- Developed a system of internal controls to safeguard financial assets of the organization and it's family members
- Enhanced and led the production of monthly financial reports and issued the output to the family as appropriate
- Implemented effective financial planning and management including budget preparation and cash flow management
- Assisted in the development of the family's investment policy and asset allocation models, analyzed investment opportunities and monitored investment performance
- Worked on the sale of several large real estate properties and a like-kind exchange that allowed the family to defer a taxable transaction
- Negotiated reduced fees for investment transactions as well as mortgage interest rates for the family
- Assisted in the setup of six new operating businesses for various family members each involving the review of a business plan, proper tax structuring, and coordinating with my network of other advisors
- Trusted advisor to the family for life events such as real estate and auto purchases, marriage/divorce, insurance purchases, deaths in the family, as well as review of co-investment deals and contracts from a financial perspective
- Developed various checklists, procedures, and education programs for the family relating to mortgage applications, estate administration, investment training, budgeting, hiring of household help, executive vehicle program, executive medical program, orientation into the family office, and governance procedures
- Responsible for overall communication from the family office as well agenda setting and leading intergenerational family meetings

MILLER COOPER & Co., CHICAGO, IL

2009 to 2010

SENIOR TAX MANAGER

Responsible for compliance work including review of Subchapter C and S corporations, partnerships, trusts, high net worth individuals and state income tax returns for a variety of industries. Researched a variety of complex issues and communicated results to clients. Consulted with clients regarding federal and state audits. Responsible for the training and development of staff.

Selected Accomplishments:

- Assisted in the development and implementation of a firm-wide income tax planning idea database to increase firm revenue and go to market with a more consistent approach
- Developed a new ASC 740 (formerly FAS 109) income tax provision package to increase overall efficiency of preparing and reviewing provisions

MORGAN STANLEY, OAK BROOK TERRACE, IL

2008 to 2009

SENIOR TAX MANAGER

Assisted in the development of new investment products. Responsible for compliance work including review of Subchapter C corporations, partnerships and regulated investment companies. Performed research on identified issues and documented the conclusions in technical memorandums. Analyzed changes in tax law to evaluate impact on the company. Managed relationships with outside service providers. Responsible for the training and development of staff.

Selected Accomplishments:

- Assisted in the development of a variety of new investment products and provided tax sign-off
- Improved operational efficiency by reviewing all tax returns relating to the Van Kampen Group of mutual funds; Review included all investment vehicles as well as corporate entities
- Served as the Tax Lead on all Unit Investment Trusts which represented a significant portion of the assets of Van Kampen

DELOITTE TAX LLP, CHICAGO, IL

1997 to 2004/2007 to 2008

SENIOR TAX MANAGER

Responsible for compliance work including review of Subchapter C and S corporations, partnerships, high net worth individuals and state income tax returns for a variety of industries. This review included communicating possible alternative return positions to clients. Consulted with clients regarding federal and state audits. Performed research for and consulted with clients on a variety of complex issues including mergers, acquisitions and tax-free restructurings. Researched, developed and utilized leading-edge tax planning strategies. Managed all areas of the client service team, including the utilization of national and local specialists. Recruited, counseled and trained new members of the tax practice.

Selected Accomplishments:

- Managed overall tax fees of \$2.5million after increasing the fees from \$1.5million over a five year period
- Developed extensive leadership experience through the oversight of 30 separate client service teams with over 20 tax staff and managers on the largest of the teams
- Assisted in the development and implementation of complex tax planning initiatives
- Assisted in the structuring of new operating businesses in order to achieve the most efficient tax vehicle
- Oversaw and trained approximately two dozen tax professionals on my largest client project

FIRST TRUST PORTFOLIOS, L.P., LISLE, IL

2004 to 2007

TAX DIRECTOR

Reviewed partnership and corporate income tax returns from a compliance perspective that included communicating alternative filing positions to the Chief Financial Officer. Reviewed tax provisions for Subchapter C corporations and regulated investment companies that included recommendations for minimizing the C corporation's effective tax rate. Assisted in the development of new regulated investment company and unit investment trust products. Managed relationships with outside service providers.

Selected Accomplishments:

- Assisted in the development of one of the industry's first closed-end fund MLP investment vehicles
- Responsible for tax sign-off on all new investment vehicle launches and product development ideas
- Saved the company \$250,000+ in further outsourcing costs
- Built and trained a tax team

EDUCATION & AWARDS

Chartered Financial Analyst Level III Candidate – Sitting June 2015

Master of Science, Taxation – Depaul University (GPA: 3.5/4.0)

Bachelor of Science, Accounting – University of Illinois at Chicago (GPA: 4.95/5.0)

Valedictorian and Accounting Department Student Awards recipient at UIC

Received 3 Commanding Officer's Letters of Commendation while serving in the U.S. Navy

References available on request