

DOWNTOWN CONNECTIONS. EAST COUNTY CONVENIENCE.

Kerkering Barberio offers the diversified expertise you would expect from a major accounting firm, along with the personalized relationship you want to fulfill your personal and professional goals.

Founded in 1972, we've grown with this community to become one of the leading Certified Public Accounting firms in Southwest Florida and a full-service firm with an office in East Sarasota/Manatee Counties. We look forward to helping you, your family, and your business to prosper and grow in this vibrant community.

Our office is conveniently located at Lakewood Ranch in the Northern Trust Bank building. It is fully staffed to handle your tax, financial planning, and estate and trust needs. We can also assist you with any of the broad array of other specialized accounting and financial services we offer.

To schedule an initial consultation with no obligation, call (941) 365-4617 and ask for Michael Goldstein or Barbara Jones - our Lakewood Ranch team.



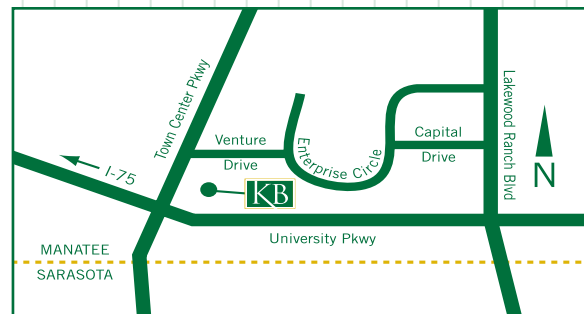
PERSONALIZED / DIVERSIFIED



Kerkering, Barberio & Co., P.A. Certified Public Accountants

In Lakewood Ranch
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6320 Venture Drive, Suite 203
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(941) 365-4617
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Kerkering, Barberio & Co., P.A. Kerkering Barberio Financial Services, Inc. KB Pension Services, Inc.

In Downtown Sarasota
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KERKERING
BARBERIO,
A FULL-SERVICE
ACCOUNTING FIRM,
SERVING EAST
SARASOTA/MANATEE
COUNTIES.



Ten Reasons To Connect

1. You are at the stage of life where you need expert guidance to integrate your tax, financial and estate planning.
2. You want the expertise and personal service provided by a trusted financial advisor regardless of the complexity of your return.
3. You know that tax and estate laws are constantly changing, but don't have the time to assess the impact on your personal situation.
4. You have started a new business and need expert tax advice.
5. You've recently moved to Florida and need advice on the impact of shifting money and assets.
6. You've sent your taxes up North to be done for the last time.
7. Your business and personal finances are closely intertwined and would benefit from a personal relationship with a comprehensive tax and financial advisor.
8. You want a tax and financial advisor with international perspective and experience.
9. You're looking for a relationship that's scalable to your expanding personal, professional and business horizons.
10. You own highly appreciated real estate and would like to defer paying taxes as long as possible

Personalized Tax Services

Our focus on taxation is year-round, not just from January 1st to April 15th. We approach your tax preparation and planning needs with a view to your overall personal and financial situation and goals. We offer individuals and businesses expert advice and knowledge, including multi-state and international taxation. Florida newcomers will find us of particular help in handling their changing tax requirements.

Personalized Estate and Trust Planning

Our approach is to integrate current income tax strategies with estate, trust and gift plans to meet your long-term personal and financial goals. We are experienced in trusts, life insurance, charitable giving, succession planning for business owners and planning for distribution of your assets. With your attorney we can assist in creating trusts that will meet your family and financial needs. As your knowledgeable tax advisor, we are able to prepare any estate, trust or gift tax returns required.

Diversified Personal and Business Services

Kerkering Barberio also offers a seamless array of expert services to meet the business and financial needs of our clients.

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| Accounting and Auditing | Individual and Business Tax Consulting |
| Business Valuation | International Consulting and Tax Planning |
| Construction Services | Not-For-Profit Organization Services |
| Enterprise Risk Management | Real Estate Support Services |
| Estate and Trust Planning | Retirement Plan Consulting and Administration |
| Financial Services | |
| Forensic Accounting and Litigation Support | |
| Healthcare Advisory Services | |

Meet Our Team

Michael Goldstein, CPA/CFP®
mgoldstein@kbggrp.com



SHAREHOLDER

Michael Goldstein is a Certified Public Accountant and a Certified Financial Planner. In addition to managing the Lakewood Ranch office, he concentrates his practice in assisting business and individuals with their tax needs in a wide variety of industries, including construction, real estate development, manufacturing, wholesale/retail and professional services.

Michael is an alumnus of Brooklyn College and the University of South Florida. He is active in the community, involved in charitable organizations, and is a member of Lakewood Ranch Business Alliance.



Barbara A. Jones, CPA/CFP®
bjones@kbggrp.com

SHAREHOLDER

As both a Certified Public Accountant and Certified Financial Planner, Barbara Jones combines a broad knowledge of individual, estate, and trust taxation with expertise in financial and estate planning.

A native New Englander and alumna of Hartwick College and the University of Hartford, she has had more than 20 years experience in the banking industry. She is active in a number of Southwest Florida professional and charitable organizations, including Lakewood Ranch Rotary Club and Lakewood Ranch Business Alliance.

In addition to her other professional certifications, Barbara holds an NASD Series 7 license.

CERTIFIED FINANCIAL PLANNER™ professional

