



## Downtown Connections. East County Convenience.

The area in which you chose to live is a very personal and important decision. Knowing that a neighborhood has the resources you need is a strong consideration. This includes the professional services of a certified public accountant. Being able to meet face-to-face on a regular basis with a CPA just minutes away has its advantages.

Founded in 1972, Kerkering, Barberio & Co. has grown with the local community to become one of the leading certified public accounting firms in Southwest Florida. Fully staffed, we are able to assist you in tax, financial planning and estate and trust needs. We are also able to provide the broad array of other specialized accounting and financial services that we offer, and it is all conveniently located on Town Center Parkway.



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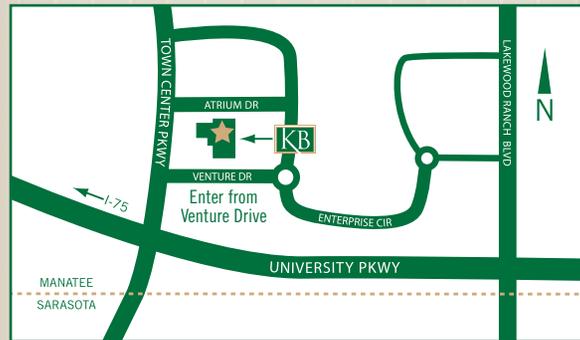


**Kerkering, Barberio & Co.**  
Certified Public Accountants

In Lakewood Ranch  
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**Kerkering, Barberio & Co.**  
**Allegiant Private Advisors**  
**KB Pension Services, Inc.**

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**A Full-Service Accounting  
Firm Serving East Sarasota  
and Manatee Counties.**



## Reasons to Connect with Kerkering, Barberio & Co.

- You've recently moved to Florida and need guidance on the financial consequences of the change in your residency.
- You have started a new business and need expert tax advice.
- You want a large firm with a local feel.
- You've sent your taxes up North to be done for the last time.
- You want a tax and financial advisor with international perspective and experience.
- You know that tax and estate laws are constantly changing, but don't have the time to assess the impact on your personal situation.
- We are available for local group presentations.



## Personalized Tax Services

For many people, filing your tax return can be a chore. It is a task to be completed, and hopefully, the outcome will be favorable - or least not too unpleasant. There is a better alternative. Tax planning should be done from a short and long-term perspective to position you most effectively and eliminate surprises. It requires year-round interaction with a tax professional. This is someone who has in-depth tax knowledge and will ask you the right questions at the right time, which is key to meeting your overall personal and financial goals.

Kerkering, Barberio & Co. has the resources to meet your tax planning needs. From a simple individual tax return to a business return to complex estate and trust matters, our staff has the experience and training to guide you. We are well-versed in handling all levels and types of tax preparation.

## 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 the 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.

To schedule an initial, no obligation consultation, call (941) 365-4617 and ask for Michael Goldstein or Barbara Jones, our Lakewood Ranch Team. We look forward to helping you, your family and your business to prosper and grow in this vibrant community.



## Meet Our Team



SHAREHOLDER

**Michael Goldstein, CPA/CFP®**  
mgoldstein@kbgrp.com

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 businesses 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 the Lakewood Ranch Business Alliance.

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



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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 more than 20 year's experience in the banking industry. She is active in a number of Southwest Florida professional and charitable organizations, including the Lakewood Ranch Rotary Club and Lakewood Ranch Business Alliance.

CERTIFIED FINANCIAL PLANNER™ professional