

JOSEPH V. FALANGA



Joe has over 30 years of professional experience dedicated to serving the personal tax and financial needs of high net worth family groups, closely held business, and individuals.

PROFESSIONAL EXPERIENCE:

- Tax planning and compliance for high net worth families and individuals
- Represent clients before the Internal Revenue Service and New York State
- Litigation support for trust and estate
- Estate and trust planning and administration
- Private foundations and charitable trusts
- Charitable planning and administration
- Family and business succession and governance
- International trusts and estate compliance
- Closely held/privately owned companies
- Family held real estate companies

BACKGROUND:

- Licensed CPA in the State of New York
- A.E.P., Accredited Estate Planner
- T.E.P., Trust and Estate Professional
- B.B.A. in Accounting, Pace University
- M.B.A., Fordham University

THOUGHT LEADERSHIP:

- “The family office boom: Contrasts between East and West”, The Economist Intelligence Unit, November 2020
- Principal and Income Act
- Leveraged Estate Planning Techniques
- Fiduciary Income Taxation
- Estate Freeze
- Appearances on CNN, Fox and NBC for various tax issues

MANAGING DIRECTOR, UHY ADVISORS NY, INC.

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INDUSTRY EXPERTISE:

- Private Client Services Group
- High Net Worth Family Groups with Emphasis on Estates & Trusts
- Real Estate

ACTIVE & PRIOR PROFESSIONAL MEMBERSHIPS:

- American Institute of Certified Public Accountants
- New York State Society of Certified Public Accountants
- National Association of Estate Planners & Councils
- Society of Trust & Estate Practitioners
- Past President of National Association of Estate Planners & Councils
- Past President of New York City Estate Planning Council
- Past Chairman of Estate Planning Committee NYSSCPA
- Past Chairman of Fiduciary Income Tax Committee NYSSCPA

ACTIVE & PRIOR CIVIC MEMBERSHIPS:

- Past Director Pace University Alumni Association