

## NANCY PATZWahl



Nancy has more than 30 years of experience dealing with estate, trust and gift taxation. While working for a Big Four accounting firm, she supervised the audits of major financial institutions and banks in the Albany area. Nancy also provides consulting, bookkeeping and records management services to newly formed businesses.

### PROFESSIONAL EXPERIENCE:

- Development and supervision of audit plans
- Evaluations of internal controls
- State and federal tax returns for individuals, fiduciaries and corporations
- Estate tax returns
- Trust & Estate taxation
- Business consultation, bookkeeping and records management services

### BACKGROUND:

- Licensed CPA in the state of New York
- B.B.A. in Accounting, University of Vermont

### PRINCIPAL, UHY ADVISORS

Email: [npatzwahl@uhy-us.com](mailto:npatzwahl@uhy-us.com)  
Direct: 518 828 1565

### INDUSTRY EXPERTISE:

- Trusts & Estates
- Family Owned and Middle Market Businesses
- Individuals
- Gift Taxation

### ACTIVE & PRIOR PROFESSIONAL MEMBERSHIPS:

- New York State Society of Certified Public Accountants
- American Institute of Certified Public Accountants

### ACTIVE & PRIOR CIVIC MEMBERSHIPS:

- Columbia-Greene Community College, Board of Trustees, former Chair
- Kinderhook Bank, Chair of the Audit Committee