

## JACOB M. KATZ



### **PRINCIPAL, UHY ADVISORS MI, INC.**

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#### **INDUSTRY EXPERTISE:**

- Financial Services
- Technology
- Manufacturing
- Oil and Gas
- Franchise Operations
- Start-ups
- Construction

#### **ACTIVE & PRIOR PROFESSIONAL MEMBERSHIPS:**

- Member – National Association of Certified Valuators and Analysts

Jacob is a member of the forensic, litigation and valuation services department, and transaction services department. As a member, Jacob has been actively involved in dozens of valuation and litigation engagements as well as transactions and management consulting on operations and strategy.

#### **PROFESSIONAL EXPERIENCE:**

- Specializes in providing litigation support, transaction consulting, business valuation and forensic accounting services to attorneys, corporate clients and individuals
  - Extensive business valuation experience across a range of industries
  - Various litigation support and expertise, including damages, business interruption, shareholder disputes, and buy-sell arbitration
- Over a decade of experience in wealth management and investment analysis
- Comprehensive experience with institutional asset management
- Specializes in providing business valuation, transaction consulting and financial advisory services to public and private organizations
- Member of the UHY Advisors Financial Modeling team
- Provides extensive estate planning support through focused insurance trust reviews
- Involved in all stages of the engagement process including case evaluation, data and statistical research, analysis of legal and IRS rulings, quality control, and reporting

#### **BACKGROUND:**

- M.B.A., Walsh College
- M.S. in Finance, Walsh College
- B.S. in International Relations, Michigan State University
- Adjunct Professor of Finance, Walsh College

#### **THOUGHT LEADERSHIP:**

- “Tax Implications of a New Presidential Administration”, interview with WJR Radio, 2021
- “Business Valuation – Frequently Un-Asked Questions”, Michigan Geo, UHY LLP Continuing Professional Education, 2019
- “Investor Psychology”, CSSC National Affiliate Conference, 2014
- “M&A Champion”, ACG Detroit Cup, 2014