



James F. Eaton, III, CPA/PFS, MBA

Tax Manager

Education: Temple University – Fox School of Business, BBA Accounting
Salisbury University – Perdue School of Business, MBA

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Background & Experience

James Eaton, a Tax Manager with KatzAbosch and member of the firm's high-net-worth and pass-through / real estate tax groups, joined the firm in 2013. James works with clients' trusted advisors such as attorneys, investment advisors and insurance brokers to help achieve individual and family goals such as tax efficient inter-generational wealth transfer or development of structured philanthropic giving plans. James' experience with small business and real estate taxation make him uniquely suited to work with owners of closely held businesses on multi-year tax planning and development of business succession plans.

James has also been identified as the firm's Subject Matter Expert (SME) on the Affordable Care Act (ACA). In addition to researching regulatory changes and disseminating program implementation information both internally and externally, James acts as an advocate for clients seeking an advisor to help them better understand the increasingly complex healthcare marketplace.

Areas of Specialization

James provides business and individual planning, consulting and compliance services for clients, including:

- Business and individual income tax planning and consultation services for high-net-worth individuals and families
- Analysis and compliance services for real estate and investment partnership tax structures
- Healthcare and ACA consulting and compliance analyses to closely held businesses
- Consulting and tax compliance services for renewable energy projects

Professional Designations

- Certified Public Accountant (CPA)
- AICPA Personal Financial Planning Specialist (PFS)

Professional Affiliations and Civic Involvement

- American Institute of Certified Public Accountants (AICPA)
- Maryland Association of Certified Public Accountants (MACPA)
- Treasurer/Board Member: Christ Lutheran Church Endowment & Foundation – Baltimore, MD

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