



Jodi M. Blair, CPA, CSEP

Member of the Firm

Jodi leads the firm's Estate Planning and Compliance Department. Her primary focus is providing accounting and tax services in estate planning, fiduciary tax compliance, and probate administration. Jodi delivers a high level of personal service to a wide variety of clients, including local attorneys and trust departments. She also provides general tax and accounting services to individuals and family-held businesses.

Jodi successfully completed the necessary education and examination requirements of the National Institute for Excellence in Professional Education, LLC and is distinguished as a Certified Specialist in Estate Planning.

She joined the firm in 1997 and was admitted as a Member in 2013.

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EDUCATION

- ▶ B.S. Accounting, *magna cum laude* - Frostburg State University

CERTIFICATIONS

- ▶ Certified Public Accountant - Maryland
- ▶ Certified Specialist in Estate Planning

PROFESSIONAL AFFILIATIONS

- ▶ American Institute of Certified Public Accountants
- ▶ Maryland Association of Certified Public Accountants
- ▶ National Institute for Excellence in Professional Education
- ▶ Tri-State Estate Planning Council
- ▶ South Central PA Estate Planning Council

COMMUNITY INVOLVEMENT

- ▶ Sunrise Rotary Club of Hagerstown - *Treasurer*
- ▶ The W House - *Treasurer*
- ▶ Hospice of Washington County - *Planning Giving Subcommittee*
- ▶ Jaycees of Hagerstown - *Past President*
- ▶ Leadership Washington County - *Class of XXII (2009)*