



## Steven Kaufman

CPA

Retired Member of the Firm

Tax & Accounting Services

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Steve provides management and financial advisory, as well as income and estate planning and preparation services, to closely-held and family-owned businesses. With his broad base of experience, he offers tailored solutions that address both day-to-day operations and long-term growth strategies. Steve's understanding of the unique needs and dynamics of closely-held businesses allows him to guide owners and management through challenges, tax optimization, and strategic decision-making. By providing proactive advice, Steve helps clients achieve financial stability and navigate the complexities of business ownership.

### Community Involvement

- Community Aid – Board Member
- Community Aid Foundation – Treasury
- Carlisle Business Education Foundation/Carlisle Area Economic Development Corporation - Board Member, Past Board Chair
- Central Pennsylvania Youth Ballet - Board Member
- Christian Retreat Center - Board Member
- Pennsylvania Association of Diving Instructors (PADI) Rescue Diver Designation
- Carlisle Chamber of Commerce - Past Board Chair, Past Treasurer
- Carlisle Family YMCA - Past Chair, Past Treasurer
- Cumberland County Historical Society - Past Financial Committee Chair
- United Way of Carlisle & Cumberland County - Past Annual Campaign Chair
- The Stevens Center - Past Chair, Past Treasurer

### Education

- B.S. Accounting - Shippensburg University

### Certifications

- Certified Public Accountant - Pennsylvania

### Professional Affiliations

- American Institute of CPAs - Member
- Pennsylvania Institute of CPAs - Member