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edelstein
accounting for you

Michael P. Antonelli CPA, MST

Partner

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MEET MIKE

For over 25 years, closely-held companies and their owners, and high-net-worth individuals and families, have relied on Mike for practical and results-oriented tax planning and reporting. They appreciate that he takes time to explain the complex tax laws and how they apply to their particular situation, and then works to find the best solution that minimizes their tax liability – even in the most difficult situations.

Mike also applies his general accounting and audit experience to help his clients identify potential risks and opportunities that go beyond tax which create more value and achieve compliance. Clients have a high respect for Mike's thoughtful and friendly approach and his personal, hands-on commitment. For all of these reasons, clients view Mike as their trusted business advisor as well as tax partner.

BACKGROUND

Mike began his career at Edelstein & Company in 1998. For the first 10 years of his career, Mike gained broad experience in audit, general accounting and tax. Now, as a partner on the firm's Tax Team, Mike provides tax planning, compliance and reporting services for private companies, their owners and high-net-worth individuals. He has worked with families and businesses of all sizes in a variety of industries, including real estate, retail, professional services and technology.

HOW MIKE CAN HELP

- Develop strategies to minimize tax liability for closely-held businesses, their owners and high net worth individuals and families
- Analyze business transactions for potential tax implications
- Provide tax planning and reporting for individuals and businesses
- Advise on entity structuring including corporations, partnerships, LLCs and others

RESULTS

- A high net worth individual was considering changing his current method of holding investments individually and through various trusts. While his proposed structure was more convenient, he was unsure about the tax implications, so he called Mike for advice. Mike analyzed the situation and determined that the proposed change would cost the client approximately $25,000 in additional tax each year while he worked, and nearly $60,000 per year when he retired.

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- One of Mike's clients, a three-year old start-up company, was beginning to show healthy profits, so the partners decided to implement a retirement plan. The plan had to accommodate for a range of retirement savings options for the partners and had to include a plan for the employees. Mike worked with management to implement a plan that fit their specific needs.
- Upon reviewing a prior year tax return for a new client, Mike quickly noticed that the client was allowed to take additional tax credits on his state tax return. Mike amended the tax return, which provided the client with tens of thousands of dollars in tax credits.

OUTSIDE THE OFFICE
Mike enjoys spending time with family, his wife Melanie, daughters Claire and Emily, and son Charlie. He also enjoys coaching Claire's softball team and playing for the Edelstein softball team.

EDUCATION

Master of Science in Taxation, Suffolk University

Bachelor of Science in Business Administration with a concentration in Accounting, University of Massachusetts (Lowell)

PROFESSIONAL AFFILIATIONS

Massachusetts Society of Certified Public Accountants (MSCPA)

American Institute of Certified Public Accountants (AICPA)

COMMUNITY SERVICE

Coaches his daughter Claire's softball team in North Andover.