



#### INDUSTRIES

Audit Services

#### SERVICES

Law Firms and Lawyers  
Manufacturing and Distribution

#### MEMBERSHIPS AND AFFILIATIONS

- American Institute of Certified Public Accountants
- BNI International Former Member
- Illinois CPA Society
- The Young Entrepreneurs Forum Former Member
- Tooling and Manufacturing Association

#### CERTIFICATIONS AND LICENSES

- Certified Public Accountant

#### EDUCATION

- B.A., Business Administration,  
University of Michigan

## JOEL A. HERMAN, CPA

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**DIRECTOR**

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O 312.670.7444

Joel has more than 35 years of professional experience at ORBA, where he has been a director since 1997. Joel is the director in charge of ORBA's on-campus recruiting and a member of the firm's Personnel Committee, as well as the chair of the Manufacturing and Distribution Group and a member of the Law Firm Group.

Joel serves manufacturers, distributors, retailers and various personal service corporations, including consulting firms, medical practices and law firms. He also works with other entrepreneurs, self-employed individuals and closely-held companies, including real estate developers, technology companies and marketing and advertising firms. This wide variety of client types and industries allows him to leverage best practices from one industry and apply them to others, which is extremely valuable to his clients.

Joel's primary area of concentration is financial statement attestation and income tax compliance. In addition to accounting and auditing services, Joel performs litigation support and is involved in due diligence investigations related to mergers and acquisitions. He also performs tax planning and compliance work for business owners and individuals.

### PROACTIVE

Joel prides himself on establishing active, consultative roles with his clients. Joel's approachable manner encourages clients to come to him for advice on day-to-day matters, emerging issues or active opportunities at any stage of their business or lifecycle. As a result, Joel has the pleasure of being a part of many client success stories as he has helped them grow from start-ups to thriving, profitable companies.

Joel's inquisitive and consultative approach regularly finds him helping clients develop proper accounting systems and internal controls for their financial functions. He also advises on tax minimization strategies and performs cost analyses, cash flow review, and other specialty consulting work to help clients meet their business needs and enhance their bottom lines.

### OUTSIDE OF THE OFFICE

Joel loves to coach, and actually spends a fair amount of his free time helping friends maintain and improve their financial platforms. Away from his calculator, though, Joel and his wife, a former Director at ORBA, spend much of their time with their three children. Evenings and weekends are quickly filled with coaching or cheering on the sidelines of baseball fields, basketball courts or soccer fields. Joel also enjoys the outdoors and plays softball and, weather permitting, walks or bicycles as frequent means of transportation.

### CIVIC ACTIVITIES

- Treasurer, Welles Park Parents Association, a youth baseball organization on Chicago's north side serving more than 1,000 kids
- Former Treasurer, Chicago Alumni Club, University of Michigan Business School
- Former Member, the Edgewater Community Council
- Former Chairman, Accountant's Division Education Committee, Jewish United Fund
- Former Member, the Lakewood Balmoral Residents Council

## SEMINARS & EVENTS

- *The Impact of the New Tax Law on Manufacturers and Distributors*, Chicago, IL, May 7, 2019
- *Tiger Teams: Empowering Your People to Accelerate Profitability*, Chicago, IL, July 22, 2015
- *How Manufacturers Can Drive, Measure and Capture Value*, Chicago, IL, January 29, 2015

## BLOGS

- *Are You Using Paralegals Effectively?*
- *Businesses Provided a Lifeline: CAA Enhances PPP Loans and Extends Employee Retention Credit*
- *Keep it Simple! "Small" Manufacturers May Opt to Use Simplified Reporting Methods*
- *Making Remote Work...Work*
- *On the Road: Let's Review the Tax Implications of Providing Company Cars*

## NEWSLETTERS

- *Manufacturing and Distribution Group Newsletter – Summer 2021*
- *Law Firm Group Newsletter – Summer 2021*
- *Law Firm Group Newsletter – Winter 2021*
- *Law Firm Group Newsletter – Winter 2020*
- *Law Firm Group Newsletter – Fall 2019*