



JACQUELINE N. JANCZEWSKI, CPA, MBT, PFS DIRECTOR

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Jacqueline's career in public accounting spans almost 25 years. As chair of the firm's Wealth Management Services Group and a director in the Tax Group, Jacqueline focuses on business taxation, providing closely-held companies, executives, attorneys, private investors and high-net-worth individuals with accounting, tax planning and compliance services. Throughout her career, she has been involved in many technical transactions and has worked with various types of business operations. This diverse experience — as well as keeping up with the ever-changing tax laws — allows her to creatively apply the principles and strategies she has learned to various client matters.

Jacqueline currently co-chairs ORBA's Women's Alliance Group.

INDUSTRIES

Law Firms and Lawyers

SERVICES

Wealth Management Services
Tax Services
Consulting for Businesses
Consulting for Individuals

MEMBERSHIPS AND AFFILIATIONS

- American Institute of Certified Public Accountants
- Illinois CPA Society

CERTIFICATIONS AND LICENSES

- Certified Public Accountant
 - Licensed by California Board of Accountancy
 - Licensed by Illinois Department of Financial & Professional Regulations
- Personal Financial Specialist
 - Estate Planning Certificate – American Institute of Certified Public Accountants
 - Retirement Planning Certificate – American Institute of Certified Public Accountants
 - Investment Planning Certificate – American Institute of Certified Public Accountants

EDUCATION

- B.A., Accounting, California State University, Fullerton
- Master of Business Taxation, University of Southern California, Marshall School of Business

PROACTIVE

Jacqueline puts herself in the clients' shoes, taking pride in keeping things moving by anticipating various scenarios and circumventing roadblocks to reach the desired goal, all while remaining mindful of quality. She gets immersed in her clients' world to understand what is important to them and help them strategize to reach their short- and long-term goals. She believes in connecting with clients throughout the year to properly plan for the best outcome. Her professional motto is: Filing a tax return is the last step in the planning process and there shouldn't be any surprises.

OUTSIDE OF THE OFFICE

Jacqueline and her husband share a love of traveling. They have visited more than 30 countries throughout the world, enjoying history and immersing themselves in diverse cultures. Originally from Southern California, Jacqueline enjoys a variety of outdoor fitness activities around Chicago, such as rollerblading, playing tennis and swimming. When she is not working or traveling, you can find her in the kitchen creating delicious meals and learning gourmet recipes.

PRESENTATIONS

- *Income and Estate Tax Planning*, UBS, Chicago, IL, April 26, 2017

SEMINARS & EVENTS

- *Tax Planning Considerations for New Law Firm Partners*, ORBA, Chicago, IL, February 13, 2019
- *Young Professionals: How to Take Control of Your Financial Future*, ORBA, Chicago, IL, June 23, 2016

BLOGS

- *Planning an Exit Strategy for Your Business*
- *Three Tips for Making Retirement Less Taxing*
- *Giving to Charity is a Little Sweeter in 2020*
- *Law Firms are Prime Targets for Hackers — Do You Have a Cybersecurity Plan?*
- *How Tax-Advantaged Health Plans Contribute to Your Financial Well-Being*
- *How to Raise Rates Carefully*

NEWSLETTERS

- *Law Firm Group Newsletter – Winter 2019*
- *Law Firm Group Newsletter – Winter 2018*
- *Wealth Management Group Newsletter – Fall 2017*