



## ADAM M. LEVINE, CPA, CFP<sup>®</sup>

HE | HIM

**DIRECTOR**

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O 312.670.7444

Adam has been with ORBA since 2005 and is a member of the firm's Real Estate and Wealth Management Groups. Adam has spent his career serving individuals, partnerships and privately-held corporations. He oversees audits, reviews and monthly accounting engagements for not-for-profits, professional service firms, and service organizations, as well as software and information technology companies. In addition to accounting and auditing services, Adam provides tax planning, business consulting, financial planning, and tax compliance consulting.

### INDUSTRIES

Dental  
Health Care  
Law Firms and Lawyers  
Not-For-Profit  
Real Estate

### SERVICES

Wealth Management Services  
Audit Services  
Consulting for Businesses  
Consulting for Individuals  
Tax Services

### MEMBERSHIPS AND AFFILIATIONS

- American Institute of Certified Public Accountants
- Financial Planning Association
- Illinois CPA Society

### CERTIFICATIONS AND LICENSES

- CERTIFIED FINANCIAL PLANNER<sup>®</sup>
- Certified Public Accountant
- Personal Financial Specialist

### EDUCATION

- B.S., Accounting and Finance, Indiana University

### PROACTIVE

Adam prides himself on getting to know his clients and learning how he can help meet their needs. These personal relationships often mean attending meetings at clients' sites and interacting with them so that he can bring value to the service that he provides. Adam often calls his clients to keep them abreast with new tax and accounting regulations as well as suggests opportunities for his clients to succeed.

### OUTSIDE OF THE OFFICE

Outside of the office, Adam spends his time with his wife and young daughters, organizing everyone's schedules. When he is not at work or at home, he can be found on the tennis court where he was once a tennis instructor, and looks forward to the day that his daughters start taking lessons.

### CIVIC ACTIVITIES

- Former Board Treasurer, Center for Independent Futures

### BLOGS

- *Nonqualified Deferred Compensation Plans Offer Important Benefits — And Some Notable Risks*
- *LLCs: How Limited Is Your Liability?*
- *Capital Gains Planning: When Timing is Everything*
- *Dollar Cost Averaging has an Unexpected Price Attached*
- *Start the Year Right: Review Withholding and Estimate Tax Payments*

### NEWSLETTERS

- *Wealth Management Group Newsletter – Summer 2021*
- *Real Estate Group Newsletter – Summer 2021*
- *Real Estate Group Newsletter – Winter 2021*
- *Real Estate Group Newsletter – Summer 2020*
- *Real Estate Group Newsletter – Spring 2019*