



ROBERT G. SWENSON, CPA, MST

HE | HIM
DIRECTOR

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Rob has been with ORBA since 1996 and is a member of the firm's Tax Leadership and Training Committees. Over the course of his career, Rob has gained extensive experience serving individuals, trusts, partnerships and privately-held corporations. His specialties include tax compliance, tax planning and consultations for owners and key executives. In addition, he represents taxpayers before the Internal Revenue Service and state taxing authorities.

Rob helps clients devise strategies for entity formation planning, mergers and acquisitions structuring and minimizing state income taxes. Rob works closely with many law firms, professional corporations, professional athletes, restaurants and also with a wide variety of other industries.

INDUSTRIES

Law Firms and Lawyers
Restaurant
Real Estate

SERVICES

Wealth Management Services
Tax Services
Consulting for Businesses
Consulting for Individuals

MEMBERSHIPS AND AFFILIATIONS

- American Institute of Certified Public Accountants
- Illinois CPA Society
- Illinois Restaurant Association

CERTIFICATIONS AND LICENSES

- Certified Public Accountant

EDUCATION

- B.A., Economics, University of Michigan
- M.S., Taxation, DePaul University

PROACTIVE

Beyond continually developing his own skills so that he can best serve his clients, Rob passes along the knowledge he gains to others. As a member of ORBA's Tax Training and State and Local Tax Committees, he combs through pending legislation to be aware of tax issues before they become law. As he learns of tax updates, he shares them with clients and ORBA staff by creating tax alerts, blogs, authoring the ORBA *Tax Connections* Newsletter and hosting tax training sessions each year for the entire firm. Rob goes the extra mile to make sure everyone he serves, firm or clients, receives relevant tax knowledge and support as soon as he becomes aware of new issues.

OUTSIDE OF THE OFFICE

While Rob focuses on supporting the firm and clients while on the job, away from work, he spends time supporting his family. Whether it's using his season tickets to Cubs games on a sunny summer day, coaching kids' sports or cheering on his alma mater, Rob enjoys being there for his family and friends.

PRESENTATIONS

- "What Not-For-Profits Need to Know About the Affordable Care Act," ORBA Not-For-Profit Group Seminar, Chicago, December 5, 2013
- "What Restaurateurs Need to Know About Health Care Reform," ORBA Restaurant Group Seminar, Chicago, January 8, 2013

PUBLICATIONS

- "Where's the Tip Line? Pros and Cons of a No-Tip Policy," *Law360*, December 2, 2015

CIVIC ACTIVITIES

- Treasurer, Stop Foodborne Illness
- Treasurer, Welles Park Parents Association

SEMINARS & EVENTS

- *How Manufacturers Can Drive, Measure and Capture Value*, ORBA, Chicago, IL, January 29, 2015
- *Making the Affordable Care Act Affordable for Your Company*, Northbrook, IL, September 26, 2013
- *What Restaurateurs Need to Know About Health Care Reform*, Chicago, IL, January 8, 2013

BLOGS

- *What Is Happening With the Employee Retention Credit?*
- *Stimulus Legislation Offers Relief for the Restaurant Industry*
- *Do Not Put Payroll Management on Autopilot*
- *Going Green Can Pay Off for Law Firms*
- *Don't Panic: How to Prepare for an IRS Audit*

NEWSLETTERS

- *Tax Connections Newsletter – Fall 2021*
- *Law Firm Group Newsletter – Fall 2021*
- *Tax Connections Newsletter – Summer 2021*
- *Law Firm Group Newsletter – Summer 2021*
- *Tax Connections Newsletter – Spring 2021*

CLIENT ALERTS

- *2021 To End Without Senate Action on the Build Back Better Act*
- *U.S. House Passes the Build Back Better Act*
- *The Infrastructure Investment and Jobs Act Includes Tax-Related Provisions You Will Want To Know About*
- *Businesses Must Navigate Year-End Tax Planning With New Tax Laws Potentially on the Horizon*
- *Potential Tax Law Changes Hang Over Year-End Tax Planning for Individuals*