



SERVICES

Tax Services
Wealth Management Services
Consulting for Businesses
Consulting for Individuals

MEMBERSHIPS AND AFFILIATIONS

- Membership/Affiliation

CERTIFICATIONS AND LICENSES

- Certified Public Accountant

EDUCATION

- B.S., Accounting, University of Illinois at Urbana-Champaign
- M.S., Accounting, University of Illinois at Urbana-Champaign

JEFFREY R. GREEN, CPA

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Jeffrey Green is a member of ORBA's Tax Group. Jeff's experience includes preparing trust, estate, high net-worth individuals, and partnerships federal and state tax returns and advising clients on estate planning.

PROACTIVE

Jeff is resourceful and is skilled at efficiently utilizing his available resources to provide his clients accurate advice and information regarding their estates and trust planning. He considers all possible solutions and outcomes and prides himself on being responsive to his clients' needs.

OUTSIDE OF THE OFFICE

Outside of the office, Jeff likes to be active as much as possible. He is very family-oriented and spends the majority of his free time with his toddler daughter.

BLOGS

- *Is Your Revocable Trust Fully Funded?*
- *An Estate Plan Benefits You and Your Family*
- *Substantiating Charitable Gifts: Do You Know the Rules?*
- *Intrafamily Loans Offer Family Value*

NEWSLETTERS

- Wealth Management Group Newsletter – Summer 2019