



Jacqueline B. Wolpert, MBA, CPA, CVA

CERTIFIED PUBLIC ACCOUNTANT

Professional Responsibilities

Ms. Wolpert is a Certified Public Accountant for the law firm of SkarlatosZonarich LLC. With over 30 years of tax experience and as a non-attorney professional working with attorneys, she is able to bring an in-depth understanding of numbers and value to the resolution of estate and trust tax issues, thus providing a unique point of view to the estate team.

The focus of Ms. Wolpert's services to the firm are as support for the Estate administration team providing assistance with all aspects of estate administration including estate and trust tax planning, and preparation of federal and state inheritance, gift and fiduciary income tax returns. In addition, due to her extensive experience working with small businesses and non-profits, assistance is frequently provided in those areas as well.

Early in her accounting career, Ms. Wolpert worked as a CPA with the Big 8 accounting firms of Touche Ross & Co., a predecessor of Deloitte Touche Tohmatsu, and Peat Marwick Mitchell and Co., a predecessor of KPMG Peat. Prior to joining SkarlatosZonarich, she was a tax manager with the Central Pennsylvania accounting firm of Smoker Smith & Associates where she specialized in estates and trusts. Ms. Wolpert originally joined the law firm in 2004 as the Chief Financial Officer. She took a 3-year hiatus to work as the Chief Financial Officer for a local non-profit arts organization after which she rejoined the firm in her new capacity.

Education

- ▶ Rutgers University Graduate School of Management, Newark, N.J., M.B.A
- ▶ Brown University, Providence, R.I., B.A.

Associations

- ▶ American Institute of Certified Public Accountants
- ▶ Pennsylvania Institute of Certified Public Accountants

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SkarlatosZonarich LLC has been recognized by Martindale-Hubbell with an "AV" rating, the highest rating awarded by this preeminent legal resource. The A rating is the highest available rating for skill level, while the V represents the highest available rating for ethics. All Martindale-Hubbell ratings are based on confidential, objective peer review.

SkarlatosZonarich LLC is recognized on the *Central PA Magazine* 2011 Hot List for "Best Professional Services."