

Kathryn S. Schultz, CPA, AEP



Kathy Schultz is Director/Chair of Corporate & International Services at Belfint, Lyons & Shuman, P.A. and specializes in providing intricate tax planning and compliance services for individuals, businesses, guardianships, estates and trusts and makes her clients feel comfortable by taking the time to explain each situation in order for them to gain an understanding of their financial situation. She frequently works with a diverse network of professionals, including local attorneys, to ensure her clients' estate and trust tax matters are properly handled. Kathy is instrumental in the firm's International Services team which assists with tax compliance and accounting services for international businesses and individuals. Kathy also assists clients with corporate service matters for Delaware investment holding companies.

Kathy is often asked to present at client, professional and business groups and writes articles about recent tax law changes, domestic and international tax matters and estate and trust planning.

Professional Affiliations

- American Institute of Certified Public Accountants
- Delaware Society of Certified Public Accountants
- Delaware Tax Institute
 - ~ Board Member (2010 – Present)
- Estate Planning Council of Delaware
- PrimeGlobal – International Tax Special Interest Group
- World Trade Center of Delaware
- Wilmington Tax Group
- Delaware State Board of Accountancy – Past Chair

Education

- University of Delaware – Graduated Cum Laude with a Bachelor of Science Degree in Accounting

Community Service

- Philadelphia Chapter and Board Member of the Delaware Chapter of the National Speleological Society o Treasurer of Philadelphia Chapter (2009 – 2015)
- Volunteer for the Delaware Division of Fish and Wildlife for the Department of Natural Resources and Environmental Control

Awards & Recognition

- Recipient of the AICPA and DSCPA's 2011 Women to Watch for Established Leaders award
- Recognized in "Delaware Today" as a 2012 and 2013 FIVE STAR Wealth Manager