

# **Kathryn S. Schultz, CPA, AEP**



Kathy specializes in providing tax planning and compliance services for individuals, businesses, guardianships, estates and trusts. She frequently works with a diverse network of professionals, including many local attorneys, to ensure her clients' estate and trust tax matters are properly handled. Throughout the year, Kathy also works closely with individuals requiring intricate tax planning.

Kathy is instrumental in the firm's International Services team which assists with tax compliance and accounting services for international businesses.

Within the firm, Kathy is responsible for the administration of the firm's tax software applications. Kathy has also spoken to client and business groups and written articles about tax-related matters such as e-filing and recent tax law changes.

## **PROFESSIONAL AFFILIATIONS**

- . American Institute of Certified Public Accountants - Council Member (2006 – 2009)
- . Delaware Society of Certified Public Accountants - Council Member (2003 – 2009); Chair (2007 – 2008); Chair of the Tax Committee (2005 – 2006)
- . Delaware Tax Institute - Board Member (2010 – Present)
- . Wilmington Tax Group
- . Estate Planning Council of Delaware - Board Member (2010 – Present)
- . World Trade Center of Delaware
- . PrimeGlobal International Tax Group

## **EDUCATION**

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

## **COMMUNITY SERVICE**

- . Treasurer of the Philadelphia Chapter and Board Member of the Delaware Chapter of the National Speleological Society (2009 – Present)
- . Treasurer of the Estate Planning Council of Delaware
- . Volunteers for the Delaware Division of Fish and Wildlife for the Department of Natural Resources and Environmental Control
- . Member of the Finance Committee for the Delaware Children's Museum (2009 – January 2011)

## **AWARDS & RECOGNITION**

- . In May 2011, Kathy was the inaugural recipient of the AICPA and DSCPA's Women to Watch for Established Leaders award.
- . In August 2012, Kathy was named a "Top Delaware Wealth Manager" in Delaware Today.