

Local CPA Speaks on Tax-savvy Investment Strategies

For immediate release: January 26, 2009

Baltimore, MD – David Goldner, CPA, CFP, CVA, presented “Tax-savvy Investment Strategies” at the American Association of Individual Investors’ Baltimore chapter meeting on January 17, 2009. Goldner’s presentation offered tips for investing in a poor economy and forming a coordinated approach to tax, investment and personal financial planning.

Goldner is a tax partner at Gross, Mendelsohn & Associates. In addition to being a CPA, he is a Certified Financial Planner, a Certified Mutual Fund Specialist and a Certified Valuation Analyst. He graduated from the University of Maryland in 1979 with a bachelor’s degree in accounting and earned a master’s degree in taxation from the University of Baltimore in 1983.

Goldner serves on the board of directors of the Baltimore Estate Planning Council. He serves on the investment committees of the Susan G Komen Foundation of Maryland and Big Brothers Big Sisters of Central Maryland.

Gross Mendelsohn is a full-service CPA and consulting firm serving the complete financial needs of privately-held businesses, nonprofit organizations and families in the Mid-Atlantic region. In addition to offering traditional audit, accounting and tax services, the firm specializes in personal financial planning, litigation support, asset management, business valuation and technology consulting. For more information, visit the firm’s Web site at www.gma-cpa.com.

Contact:

Susan Gorham, Director of Marketing
Gross, Mendelsohn & Associates, P.A.
36 S. Charles Street, 18th Floor
Baltimore, MD 21201
Office: 410-685-5512
Direct: 410-900-1324
Fax: 410-752-5042
E-mail: sgorham@gma-cpa.com

18th Floor
36 South Charles Street
Baltimore, MD 21201-3172

410.685.5512
800.899.4623
fax 410.752.5042
www.gma-cpa.com