

## Top Ten Year-End Tips and Tactics in a Time of Tax Uncertainty *Webinar Presenter Biographies*



**Michael J. Hermes, CPA - [mjhermes@herbein.com](mailto:mjhermes@herbein.com)**  
**Manager, Herbein + Company, Inc.**

Michael J. Hermes, CPA joined the Herbein tax team in the Fall of 2019 with over 9 years of tax experience working with a diverse group of clients including real estate owners, medical and dental practices and service providers. His tax expertise includes federal and multi-state compliance and planning for closely-held businesses as well as comprehensive strategic tax planning for both family-owned businesses and high net worth individuals. Michael especially enjoys working directly with business owners and guiding them through the challenges they face on a day-to-day basis. "I'm hands-on", explains Michael, "That's what I like to do best. I don't like surprises – I like planning."

That planning includes developing detailed financial forecasts, analyzing risks and evaluating tax consequences in order to provide business owners with valuable insight to make well-informed decisions. He is adept at working with business owners through all stages of their business – from start-up to succession planning and exit strategies. Michael's skills have been recognized by the Pennsylvania Institute of Certified Public Accountants (PICPA) with their invitation for Michael to join the PICPA's Pittsburgh Chapter Emerging Leaders Program in the fall of 2019. Attendees of the program are nominated and selected and must demonstrate exceptional technical proficiency along with a strong desire to develop as a leader.



**David E. Peritz - [deperitz@herbein.com](mailto:deperitz@herbein.com)**  
**Senior Manager, Herbein + Company, Inc.**

David E. Peritz has twenty five years of diversified public accounting experience. His background includes many years with two national accounting firms prior to joining Gable, Peritz, Mishkin & Co. in 2002, then merging into Herbein + Company, Inc. in 2018. He has extensive experience in accounting for health care professionals, wholesale and retail businesses, real estate entities, and construction companies.

He has provided consulting and has been involved in the organization and start up of many business ventures and operating businesses, in every stage from forecast through the operational phases of the entity. His accounting and tax background not only provides him with solid credentials, but also provides him with knowledge that help many business owners succeed. Dave specializes in business consultation services for closely held companies, start-up ventures, and medical and dental practices.

Dave has also conducted seminars and spoken to various groups, covering a broad range of topics including real estate, management advisory services, business start-ups, pension and profit sharing plans, and various tax issues for construction companies. He is actively involved in various networking organizations.



**Stacy A. Weller - [saweller@herbein.com](mailto:saweller@herbein.com)**  
**Senior Manager, Herbein + Company, Inc.**

Stacy A. Weller, CPA began with Herbein + Company as an intern and became a full-time employee in 2005. Stacy is currently a Senior Manager in Herbein's Tax Department.

Stacy is responsible for managing multiple individual and corporate client tax engagements. She services numerous industries including manufacturing, professional services, and investors. She specializes in individual tax planning, compliance, and tax minimization strategies for small to mid-size Herbein clients.

Stacy's professional focus includes estate, trust, gift planning, and compliance for high net worth individuals. She works closely with attorneys and other professionals in the area of estate and trust. Stacy's favorite aspect of her job is working daily with clients.

Stacy enjoys spending time with her family including her husband, son, and daughter. She loves fishing, and dreams of returning to Alaska again. She enjoys vacationing, baseball games, being outside, and spending time with family and friends.