

Guide to Maximizing Loan Forgiveness and the New Flexibility Rules

Webinar Presenter Biographies



James A. Michalak - jamichalak@herbein.com
Chief Information & Digital Officer, Herbein + Company, Inc.

James A. Michalak, CPA, CITP joined Herbein in 2002 as a Manager in the Accounting & Auditing Department. He is a Partner and serves as the firm's first Chief Information & Digital Officer. Jim has over 25 years of experience servicing manufacturing and distribution companies, financial institutions (in areas such as audit, internal audit, asset based lending field exams) and employee benefit plan audits.

As chair of Herbein's Internal Technology committee, Jim is responsible for ensuring the firm remains on the cutting edge in providing effective solutions to current clients. Jim also serves as the partner in charge of marketing. In this role he works closely with the marketing team to optimize opportunities and ensure firm growth.



David E. Peritz - deperitz@herbein.com
Senior Manager, Tax, 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.