



JAMES PELLINO, CPA

HE | HIM
DIRECTOR

jpellino@orba.com
O 312.670.7444

Jim has been with Ostrow Reisin Berk & Abrams, Ltd. since 2008 and is the chair of the firm's Employee Benefit Plans Services Group. Jim manages audits, reviews and monthly accounting engagements for manufacturers, private equity firms, restaurants, construction contractors, professional service providers and clients in various other industries. He also specializes in assisting clients with various 401(k) compliance issues and 401(k) audits.

In conjunction with the accounting and audit procedures, Jim prepares various income, sales and benefit plan tax returns for his clients. Jim has experience with entity formation and structuring, tax planning for corporations and individuals, personal investment advice, analysis of financial statements and providing accounting training and support to closely-held businesses.

INDUSTRIES

Restaurant
Manufacturing and Distribution

SERVICES

Employee Benefit Plans Services
Wealth Management Services
Audit Services

MEMBERSHIPS AND AFFILIATIONS

- American Institute of Certified Public Accountants
- Financial Industry Regulatory Authority Registered Investment Advisor
- Illinois CPA Society

CERTIFICATIONS AND LICENSES

- Certified Public Accountant

EDUCATION

- B.S., Accountancy, University of Illinois at Urbana-Champaign
- M.S., Accountancy, University of Illinois at Urbana-Champaign

PROACTIVE

Jim takes a proactive not a reactive approach to his business. He believes that on-going communication between him and his clients is essential and allows him to give the best value added advice. With this enhanced communication, Jim is able to find solutions to his clients' problems that others would not. Jim views every engagement as a team effort and is personally vested in his clients' successes.

OUTSIDE OF THE OFFICE

Jim believes opportunities present themselves in every situation, whether business or personal. In his free time, you can find Jim running on the lakeshore or at one of great Chicago restaurants spending time with his family and friends.

SEMINARS & EVENTS

- *Employee Benefit Plan Design and Trends, ORBA, Chicago, IL, December 16, 2014*

BLOGS

- *Heads Up, Restaurants: Federal Relief Could Trigger a Single Audit*
- *IRS Compliance Checklist: Keep Your Plan Running Smoothly and Legally*
- *Pooled Employer Plans: A Look at How Small Employers Can Benefit*
- *Understanding Private Equity Investments in Defined Contribution Plans*
- *The RESTAURANTS Act: Will Congress Deliver Additional Financial Relief?*