



## RICHARD E. MORRIS, CPA, MST

Executive Vice President | Director - Tax Services

*While the basics of our work for each client might be the same, each one's situation is always unique. Understanding them and relaying that understanding is very important to building a mutually beneficial relationship.*

Richard E. Morris, CPA, MST, chose a career in accounting because he enjoys problem-solving and finds helping owners of closely-held businesses work through their tax puzzles incredibly fulfilling. That enthusiasm, coupled with his self-proclaimed substantial quality of chugging along until the job is done, has served him – and clients – well for more than 35 years.

The analytical, creative and thorough executive committee partner and director of tax services at Councilor, Buchanan & Mitchell (CBM) works side-by-side with closely-held and family businesses, their owners, key personnel and executives to create optimal, custom tax planning and compliance strategies. Richard approaches every client with the mindset of “organic planning for the whole.” It’s not just “Tom’s Enterprises,” he explains, using a figurative example. It’s Tom, his family, and his key employees because Richard knows people go into business to make money for their family and community – not the government – so the primary goal is to help them minimize liabilities and capitalize on growth opportunities.

He also has extensive experience in trusts and estates, corporate, individual and partnership taxation and planning, and advising on compensation, retirement planning and succession matters. Richard holds a Series 65 Securities License and has worked with various associations and boards on their investment policies and management.

Richard enjoys working closely with clients who have unusual or complex tax issues that require customized solutions beyond general tax compliance. He also has substantial involvement in not-for-profit tax and accounting issues, including public and private foundations, and unrelated business income tax issues. He also represents clients before the IRS and various state and city governmental agencies on many matters, and interacts with multiple levels of government and professional organizations to be at the forefront of current and pending tax legislation. It’s part of his effort to follow his own advice to “do your homework and always be prepared.”

His experience doesn’t stop at tax matters, though, as Richard often helps clients with corporate structuring, entity selection, transaction planning and analysis.

Industry-leading publications, such as the Washington Business Journal, frequently seek his thought leadership, and he has appeared on TV and radio to share his expertise. Richard has also been a speaker and instructor to numerous groups, associations and universities on tax, business formation and real estate issues.

Much of Richard’s work ethic inspiration comes from Meg Meeker’s book *Strong Fathers, Strong Daughters*, which taught him how to encourage his two daughters (and two sons), whose energy and enthusiasm are his most significant form of motivation, to grow up strong and confident. When he’s not helping clients, Richard dreams of driving across the United States using nothing but side and back roads to explore the hidden parts of the country.

## Contact

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## Qualifications

- Certified Public Accountant (CPA), Maryland
- Series 65 Securities License

## Expertise

- Corporate Structuring
- Entity Selection
- Financial Planning
- Not-for-Profits
- Tax Planning and Compliance
- Trusts and Estates

## Education

- B.S. Accounting, Catholic University of America
- M.S. Taxation, George Washington University

# Richard E. Morris, CPA, MST

## Professional Associations and Activities

- American Institute of Certified Public Accountants (AICPA) (Member)
- Greater Washington Society of CPAs (Member)
- Maryland Association of CPAs (Member)

## Community Involvement

- Johns Hopkins Health System (Finance Committee)
- Sibley Memorial Hospital (Board of Trustees, Treasurer)
- St. Peter's Parish (Finance Council)

## Recent Presentations and Articles

- Year-end Financial Planning, Investments and Tax Planning (11.29, 12.7 & 12.8.2022; 12.7, 9 & 10.2021)
- What to Know About the Biden Administration's Proposed Tax Plan (6.29.2021)
- Navigating the SBA's New PPP Loan Forgiveness Application and Dealerships (6.10.2020)
- Remote Work & Cybersecurity: Protecting Yourself and Your Clients (5.14.2020)
- Q&A: The Small Business Administration, Relief Programs and Dealerships in the COVID-19 Era (5.1.2020)

## Awards

- Enterprise Worldwide "Brand Ambassador" Award (2014)

***Read more about Richard E. Morris at [www.cbmcpa.com/people/richard-e-morris/](http://www.cbmcpa.com/people/richard-e-morris/).***