



THOMAS J. BURTON

CPA, MBA

Senior Tax Manager | Director - Construction and Real Estate Services

Your most important client is the one to which you are currently providing service. Each client perceives what is good service in their own unique terms.

Contact

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Qualifications

- Certified Public Accountant (CPA)

Expertise

- Construction and Real Estate
- Distribution
- Healthcare
- Not-for-Profit
- Retail
- Tax Planning and Compliance
- Transportation
- Trusts and Estates

Education

- B.S. Accounting, American International College
- MBA, Bentley University

Thomas Burton, CPA, MBA, doesn't usually tell people he's an accountant. In his first introduction, he usually says he minimizes taxes. They are then intrigued to want to know more. While much of his work is transactional, Tom, a senior tax manager with Councilor, Buchanan & Mitchell (CBM), provides a full-service approach from start to finish.

He starts by asking questions and listening carefully about why clients want to craft a tax strategy, and for which financial and operational goals. Often, that includes working with partnerships and S corporations in construction and real estate, where he provides guidance on Section 1031 like-kind exchanges and housing credits. Tom also helps clients in the transportation, retail, distribution, healthcare and not-for-profit industries review their financials to plan transactions, sales purchases or restructuring to create a sustainable strategy for the long term.

Tom, who offers 40 years of tax planning, preparation, and compliance experience, also helps individuals, including those with high net worth, create lasting family legacy plans via the planning and administration of trusts and estates.

Before joining CBM in September 2018, Tom was a tax director with a Maryland-based regional CPA firm for more than 20 years and served in management roles with two different national firms. He has been a speaker and instructor for numerous groups and associations, and has appeared on radio and television to discuss various tax issues.

Tom's determination to help clients through complex matters comes from the inspiration he finds in his family lineage. His mother's side of the family has roots going back to 1735 in Alexandria, Virginia, and a township in Pennsylvania is named after one of the women in his family. From the late 19th to early 20th century, his great-grandmother owned two storefront businesses – and the buildings in which they operated, on the town's Main Street. This history constantly reminds him, "If they can do it, so can I."

As a supporter of the performing arts and a musician himself, it's no surprise his favorite memory is when he and a group of friends performed on stage with jazz legend Dave Brubeck on three different occasions. Brubeck even invited Tom and his fellow musicians to produce a recording with him, a track that went on to win a Grammy!

Thomas J. Burton, CPA, MBA

Professional Associations and Activities

- American Institute of Certified Public Accountants (AICPA) (Member)
- Greater Washington Society of CPAs (Member)
- Rhode Island Society of CPAs (Past Board Member)

Community Involvement

- Alexandria Choral Society
- Ocean State Chamber Orchestra (Founding Board Member, Past Treasurer)
- Voce Chamber Singers (Past Treasurer)
- Jaycees

Recent Presentations and Articles

- ABCs of Estate Planning – A Wise Way to Live *(10.22.2020)*

Read more about Thomas J. Burton at www.cbmcpa.com/people/thomas-j-burton/.