



**JOSEPH F. WILSON, JR.,
CPA, MST**
Senior Advisor

When it comes to crafting an estate and trust, Joe sees beyond the scope of tax compliance and seeks to understand the deeper goals his clients envision for their individual, business, and family legacy.

Contact

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Qualifications

- Certified Public Accountant (CPA), Maryland
- Certified Public Accountant (CPA), District of Columbia
- Certified Public Accountant (CPA), New York
- Certified Public Accountant (CPA), Virginia

Expertise

- Corporate Tax
- Trusts and Estates

Education

- B.S. Accounting, University of Virginia
- M.S. Taxation, George Mason University

Recognizing the complexities of tax compliance and the unique circumstances every client brings to the table, Joseph F. Wilson, Jr., CPA, MST, exudes the knowledge and confidence found only in someone with more than 40 years of experience. His broad yet refined expertise in tax preparation and planning services provides him with the composure, intuition and accessibility to help a range of clients make strategically calculated decisions for their estate and trust planning, administration, and compliance.

Never a believer in a one-size-fits-all mentality, Joe understands helping clients maximize their wealth, minimize their tax burden and ultimately reach their financial goals requires more than a keen eye and quick wit. Using his reputably calm demeanor and approachability, Joe aims to ensure every client's financial legacy represents their lifestyle, business and family goals.

Joe's corporate tax experience is prevalent throughout his long-standing career supporting emerging businesses through the complexities of startup operations and venture capital funding. Before joining the leadership team at Councilor, Buchanan & Mitchell (CBM), Joe co-founded the Washington, D.C.-based accounting firm Chaconas & Wilson, P.C. in 1986 and provided audit and tax services at a Virginia-based accounting firm.

Energized by every new challenge and opportunity to overcome obstacles as a co-director of CBM's tax services. He also is active in his community, serving on the finance committee of Ballston Park Homeowners Association and the financial review committee at Trinity Presbyterian Church in Arlington, Virginia.

Joseph F. Wilson, CPA, MST

Professional Associations and Activities

- American Institute of Certified Public Accountants (AICPA) (Member)
- Virginia Society of CPAs (Member)

Community Involvement

- Ballston Park Homeowners Association (Finance Committee)
- Trinity Presbyterian Church, Arlington, VA (Financial Review Committee)

Read more about Joseph F. Wilson at www.cbmcpa.com/people/joseph-f-wilson/.