



**RICHARD E. MORRIS, CPA, MST**  
**PARTNER | DIRECTOR - TAX SERVICES**

Richard Morris is a partner and director of tax services at CBM. He has more than 30 years of public accounting experience, working with closely held businesses, their owners and executives. He also has extensive involvement in estate, trust, corporate, individual and partnership taxation and planning, including compensation, retirement planning and succession issues. He holds a Series 65 Securities License and has worked with associations and boards on their investment policies and investment management.



His public accounting experience includes corporate structuring, entity selection, transaction planning and analysis, estate planning and working with closely held and family owned businesses, and their owners and executives. Richard works very closely with clients who have unusual or complex tax issues that require customized solutions and go 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.

His expertise has been sought after by industry-leading publications such as the Washington Business journal and he has authored articles and has been interviewed on television and radio. Richard has also been a speaker and instructor to numerous groups, associations and universities on tax, business formation, and real estate issues, and has authored tax articles.

Richard represents clients before the Internal Revenue Service and various states and cities on a variety of issues. He interacts with various levels of government and professional organizations in order to be in the forefront of current and pending tax legislation.

**PROFESSIONAL QUALIFICATIONS AND EDUCATION**

- Certified Public Accountant, Maryland
- Bachelor of Arts in Accounting, Catholic University of America
- Master of Taxation, George Washington University
- Series 65 Securities License

**PROFESSIONAL ASSOCIATIONS AND ACTIVITIES**

- Maryland Association of CPAs (MACPA), Member
- American Institute of CPAs (AICPA), Member
- Greater Washington Society of CPAs (GWSCPA), Member

**CIVIC AND BUSINESS ASSOCIATIONS**

- Board of Trustees, Sibley Memorial Hospital, Washington, DC
- Treasurer, Sibley Memorial Hospital, Washington, DC
- Parish Finance Council, St. Peters, Olney, MD
- Finance Committee, Johns Hopkins Health System

**AWARDS**

- Enterprise Worldwide's (EW) Brand Ambassador 2014