

Wendy Serota

Wendy Serota, Tax Accountant, oversees the preparation of estate and inheritance tax returns, as well as income and foundation tax returns for the firm's Trust and Estates Department. She provides support to the attorneys preparing complex estate tax projections and managing the Department's gift tax responsibilities. She provides guidance to the fiduciary administrators with estate and income tax filings and resolves client matters with federal, state and local taxing authorities. Ms. Serota has been in practice for over 20 years.

Education

Temple University, Fox School of Business, MBA

Temple University, Fox School of Business, BBA, Accounting and Business Law

Professional Affiliations

American Institute of Certified Public Accountants (AICPA)

Pennsylvania Institute of Certified Public Accountants (PICPA)

Philadelphia Estate Planning Council

Other Distinctions

Pennsylvania State Certified Public Accountant

Community & Pro Bono

Jewish Federation and Jewish Family Services (JFS), Volunteer