

# Steven V. Wintersteen

TAX & BUSINESS SERVICES

Steven Wintersteen is a partner in the Firm's Tax & Business Services division and a member of the Chicago office tax group. He joined Marcum in 2015 via the Firm's merger with Frost, Ruttenberg, & Rothblatt P.C., one of the largest full-service accounting firms in the Chicago region.

Mr. Wintersteen specializes in sophisticated tax and business planning for individuals and small to mid-sized companies. He has done tax planning for many companies involving mergers and acquisitions, divestitures, restructurings, real estate and like-kind exchanges and was FROST's "go-to" for international income tax planning.

He joined Frost in 2008 with 30 years of public accounting experience, including nine years with a national CPA firm, and more than 10 years working as Tax Director with one of the wealthiest family groups in Illinois. He has taught courses on taxation for small businesses, accounting periods and methods, and financial statement interperiod tax allocation. He has appeared on radio and cable television programs covering new tax law developments and issues related to individual income and estate taxation.

Among his accomplishments, Mr. Wintersteen:

- Saved over \$250,000 in estate tax for a small estate using tax planning techniques employed post-mortem.
- Worked as team leader on a \$10,000,000 IRS appeals case that ended with a no-change letter.
- Worked as Tax Director responsible for all tax aspects of the merger of a family-owned telecommunications company into a national phone company.
- Worked as Tax Department head overseeing tax policy and professional development.

## Professional & Civic Affiliations

American Institute of Certified Public Accountants (AICPA)  
Illinois CPA Society



**Steven V. Wintersteen, CPA\***  
Partner

## AREAS OF EXPERTISE

Divestitures  
Like-kind Exchanges  
Mergers and Acquisitions  
Real Estate  
Restructurings

## EDUCATION

University of Illinois, BS, Accountancy  
DePaul University, MST



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MEMBER

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