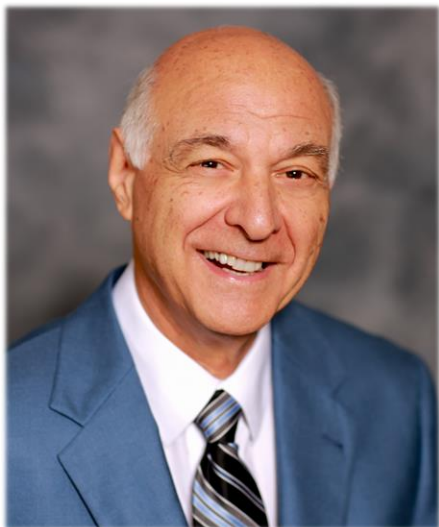


Are you looking for a professional speaker?



Dr. Bart A. Basi

Senior Advisor

CPA/Attorney at Law

Contact Dr. Basi

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Marion IL, 62959*

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Are you looking for a well-recognized knowledgeable, and dynamic speaker on business, tax, and financial topics for your local, regional, or national audience? Look no further!

- ✓ Check out Dr. Basis' Resume and see why he is the professional you want speaking to your audience!
- ✓ Each topic Dr. Basi speaks about is relevant to your business. Check it out!

Dr. Bart A. Basi is a nationally recognized expert on matters of

- ✓ business valuation,
- ✓ business succession,
- ✓ retirement and estate planning,
- ✓ strategic planning, mergers, and acquisitions,
- ✓ tax aspects of business
- ✓ financial decisions
- ✓ decision making.

It doesn't matter whether your group/association is small, medium, or large; Dr. Basi has addressed groups of all sizes in venues throughout the United States, Mexico, and Canada. Format for the meetings can vary from work-shop to seminar to formal presentation. Dr. Basi will bring enlightenment on many topics to the members of your group/ association. Dr. Basi's credentials underscore his performance whenever he addresses an audience. He has been educated at some of the best schools in the country (Syracuse University, University of Louisville, Indiana University, and Stanford University); he holds degrees in Accounting, Finance, Economics, and Law. Besides being a retired university professor, he is a CPA and a lawyer specializing in business transactions. He lectures, writes, researches, and advises throughout the United States. He is the author of several books and has published hundreds of articles.



Take a look at what others have to say!

Testimonials

"...it's clear that your appearances had an impact on our group. I heard only positive things about your session on business valuation. And the fact that you spent time on an individual basis with so many members in the exhibit hall...was phenomenal!...." Thanks again for your valuable contribution to the success of our ...convention."

"(Dr. Basi's) knowledge is unparalleled and his presentation style is dynamic, interactive, and entertaining. You certainly get your money's worth with Bart."

"Our members flock to his programs because they know they will get a "meaty" pro-program full of take-home and 'put into immediate use" tips. I think the real success of a speaker is shown by the number of folks that stay after a presentation to pick his brain and in this case, Bart is like the Pied Piper- they can't get enough of him."

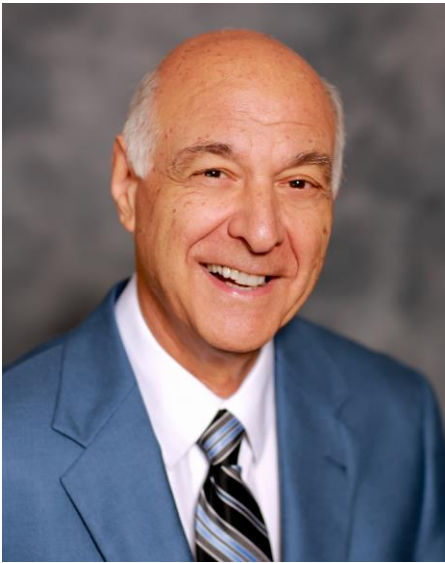
*"Once again you were a hit! You are becoming a welcomed permanent fixture at Expo"
"SUPER SUPER DUPER!!!! Thanks so much for delivering two highly charged seminars to an attentive audience at the ...convention in New Orleans. You really dazzled them! all I heard from everyone was how terrific you are and what a polished presentation you deliver. In addition to presenting your material in a way which is easy to understand and can "sink in" peoples mind(s), you have a great wit which delighted the audience!"*

"Our Spring Conference offered one of the finest educational programs it has been our pleasure to present and you were the star performer. Your presentation at the opening session was well received and set the serious tone and mood for two days of productive workshops. We're very grateful to you for your outstanding work."

We have never had such outstanding comments on a convention speaker! Not only did you make your subject matter interesting, but you have a wonderful sense of delivery that really gets through to your audience. We are still receiving phone calls and messages from attendees who say your program was simply the best ever!"

"...and when taxes once again became the subject of almost every newscast, you were the person we thought of immediately."

"Comments made to us included: 'this was worth the entire expenses of the trip' and 'he really knows what he's talking about.'"



Education

- Bachelor's Degree in Accounting, Utica College of Syracuse University
- Master's Degree in Business Administration, Syracuse University
- Juris Doctor in Law, University of Louisville
- Doctorate in Business Economics and Accounting, Indiana University
- Post-Graduate study, Stanford University

Professional Licenses

- Certified Public Accountant
Indiana (1967-2000; 2008-present)
- Attorney at Law
Kentucky (1969)
Pennsylvania (1972-1982)
Illinois (1978-present)
New York (2010-present)

Areas of Expertise

Dr. Basi has expertise in the areas of financial accounting, business succession, business valuation, mergers and acquisitions, retirement and estate planning, strategic planning, and tax aspects of business decisions for closely held and family businesses. He speaks nationwide, writes, and researches on all of these areas. He has written five loose-leaf bound books, fourteen workbooks, and over 300 articles, and has worked with hundreds of businesses and associations. Journals that have published Dr. Basi's work include "Money Matters," "The American Journal of Small Business," "The Journal of Family Law," "The Journal of Estate Planning," "The Tax Lawyer," "Small Business Taxation," "Taxation for Individuals," "Taxation for Accountants," "Taxation for Lawyers," "The CPA Journal," and "The Tax Executive". Dr. Basi is the author of "The Tax Report," a bi-monthly report on income and estate tax matters for closely-held businesses, "Accounting and Taxes," a monthly column distributed to individuals and trade journals, and the "Tax Advisory," a monthly tax advisory for closely-held and family businesses.

Academic Affiliations

- Currently holds the rank of Professor Emeritus at Southern Illinois University, Carbondale, IL.
- Formerly affiliated with Penn State University, Indiana University, The University of Louisville, and Syracuse University.
- Teaching Specialties: accounting, corporate taxation, estate planning, and business valuations for closely-held and family-owned businesses.

Business Affiliations and Memberships

- Founder of and currently Senior Advisor, The Center for Financial, Legal, and Tax Planning, Inc.
- Memberships have included the American Bar Association's Tax Committees on estate and gift taxes, business succession, and business planning and valuation.
- Past member of the Institute of Business Appraisers.
- Currently, a faculty member of Lawline.com and Further Ed. (Online continuing education courses)
- Admitted to the Bar of the United States Supreme Court

Awards, Honors, and Recognitions

- 2018 IBBA (International Business Broker's Association) Advocate of Year Award
- Listed in Harvard Business School Profiles in Business and Management: An International Directory of Scholars and Their Research.
- Recipient of educational grants for advanced course work in Taxation from the Practising Law Institute, New York.
- Listed in The Tax Analyst Directory and the Lexis Computer Tax Library as a tax professional in the U.S., specializing in family and closely held companies.
- Listed in Who's Who Comprehensive and National Registries, Who's Who International Registry, Who's Who in Leading American Executives, and Who's Who Among America's Teachers.
- Listed as an expert in taxes and business valuations in the Wisconsin and Illinois Register of Expert Witnesses.
- Member of Phi Kappa Phi, national honorary, Beta Alpha Psi, accounting honorary, and Beta Gamma Sigma, business honorary.
- Recipient of the 1st Law Line Award for out of state Presenter for continuing education to attorney's in the U.S.
- Conducts continuing education courses and prepares the examination for individuals registering with the Internal Revenue Service as tax return preparers.