

BARBARA TAIBI

Partner

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SPECIALTIES

- Personal Financial Services
- Private Client Services
- Individual Tax Planning
- Estate Planning
- Retirement Planning
- Executive Tax Planning
- Trusts & Estates

CREDENTIALS/EDUCATION

- Certified Public Accountant (CPA)
- Personal Financial Specialist (PFS)
- Seton Hall University: BS, Accounting; Economics minor

AFFILIATIONS

- American Institute of Certified Public Accountants
- New Jersey Society of Certified Public Accountants

Barbara Taibi is a Partner in the Personal Wealth Advisors Group. She has more than 20 years of public accounting experience and more than 15 years of experience in income tax planning and tax return preparation. Barbara focuses on helping clients plan for and meet their financial and tax goals.

Barbara works extensively in the areas of succession planning, retirement planning, estate planning, income tax and gift tax planning, and cash flow planning for high net worth individuals, families, corporate executives of major companies and closely held business owners. She has represented clients before the Internal Revenue Service and state tax authorities.

Barbara frequently speaks to professional groups on current tax issues and has been published in several professional publications.