

HBK HILL, BARTH & KING LLC

Principal Profiles

James M. Rosa, CPA, PFS

Principal/Tax Department



Jim is a Principal in the Tax Department in the Boardman, Ohio office of Hill, Barth & King LLC (HBK) and has been with the firm since 1986.

Jim has extensive experience in personal and estate planning, entity planning including corporate mergers and acquisitions, S corporations, Limited Liability Company and partnership taxation, entity structuring and individual tax and financial planning. Jim earned the Personal Financial Specialist (PFS) designation awarded by the American Institute of Certified Public Accountants to recognize CPAs who provide financial planning service. Jim also has considerable experience in tax policies, procedures and resources which HBK use in their tax practices. Jim provides expert research and counsel in high-net worth individuals as well as HBK members and their businesses and personal clients, in addition to being the Chair of the Tax Committee for HBK.

Education

- BS Degree in Business Administration from the University of Toledo

Professional/Civic Associations

- Member, American Institute of Certified Public Accountants (AICPA), including the Tax Division and Personal Financial Planning Division
- Member, Ohio Society of Certified Public Accountants (OSCPA)
- President, Mahoning Valley Economic Development Corporation
- President, Boardman Community Foundation, Inc.
- Member and Past President, Mahoning-Shenango Valley Estate Planning Council
- Member, Planning Committee, Review Committee and Endowment Committee of Youngstown/Mahoning Valley United Way
- Chair, Boardman Township Business Advisory Committee
- St. Charles Church, Past Member Finance Committee, Building Committee, Endowment Committee and Chair of "Enhancing Our Ministry" Fundraising Campaign
- Youngstown Catholic Diocesan Board of Education, Past Member
- Boardman Rotary, Past Member
- Youngstown Chamber of Commerce Small Business Committee, Past Member
- Class of 1992 Leadership Mahoning Valley

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