



Valerie C. Middlebrooks, CPA
Director – Tax & Small Business



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Valerie joined the firm in 2005 and then again in 2017 after working for a Top 100 firm in Bethesda, Maryland and a local firm in Delaware. A tax generalist with a strong knowledge base in providing compliance and advisory services to her clients, Valerie works closely with the many experts within the firm to address her clients' varied circumstances. Valerie's experience includes working with large privately held companies, nonprofits, small businesses, high net worth families, and international businesses (and individuals), and has extensive knowledge leading an engagement team, acting as a back-office tax department for a global manufacturer. Her widespread background provides a wealth of insight and expertise for the many issues her clients may face.

Valerie values the personal approach to accounting, preferring to meet face-to-face as she helps her clients navigate their tax returns, and understand their tax planning, estate planning, and transactions. Her personable nature, in addition to her technical mindset, help her clients align their personal and tax goals.

Within the firm, Valerie's priorities include team building, training, and employee advocacy. She believes individual and firm prosperity begin with teamwork. Along with internal team meeting participation, Valerie presents on various tax topics for organizations such as the State of Delaware IRS, Division of Revenue Annual Fed/State Tax Institute, and the firm's Belfint Briefing Seminars.

Professional Affiliations

- American Institute of Certified Public Accountants
- Delaware Society of Certified Public Accountants – Past President

Education

- University of Wisconsin – Bachelor of Business Administration – Accounting and Marketing

Community Service & Awards

- Fresh Start Scholarship Foundation – Treasurer
- Delaware Center for Justice – Treasurer
- Woman to Watch – Delaware Society of Certified Public Accountants 2012

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Karly A. Laughlin, CPA
Principal – Tax & Small Business



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Karly has more than 11 years accounting experience and a vast knowledge of industry experience. Karly quickly became a key member of the firm's Estate & Trust Section where she specializes in the preparation of tax returns associated with estates, trusts, and gifts. Karly is committed to understanding client dynamics, building long-lasting client relationships, and willing to tackle a challenge head on. Clients and families experiencing grief or even difficulty with planning estates and trusts can easily rely on Karly to guide them through the process and even work with estate planning attorney's. While Karly has much experience and knowledge in estates and trust, she also provides tax planning, tax preparation, accounting services, and QuickBooks maintenance. In addition, she is integral in the preparation of tax returns related to nonprofit organizations.

Karly communicates important law and industry changes as a Keynote Speaker at Belfint Briefings and the yearly Tax Update and regularly attends the Annual Heckerling Institute on Estate Planning Conference. Within the firm, Karly has contributed to the firm's tax and small business blog – *A Matter of Tax* and has presented on estate, trust, and tax issues at various local organizations and currently assists with the firm's hiring process and new job training.

Professional Affiliations

- American Institute of Certified Public Accountants
- Delaware Society of Certified Public Accountants
- Estate Planning Council of Delaware
 - Board Member
- Wilmington Tax Group

Education

- University of Delaware – Bachelor of Science Degree in Accounting & Finance

Awards & Community Service

- 2017 CPA Practice Advisor 40 Under 40 Honoree
- Delaware CarePlan – Treasurer
- Wilmington Flower Market – Volunteer
- Christmas Shop Foundation – Volunteer
- Faithful Friends Animal Society
 - Animal Rescue
 - 5K Participant

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We are listening



Michael D. Kelly, CPA Principal – Tax & Small Business



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Michael has over ten years of experience focusing on taxes while working with various types of industries including medical practices, optometrists, law firms, franchises, family-owned businesses, and construction companies.

Michael specializes in individual and business taxation, trust and estate taxation, state and local taxation, and nonprofit advisory. He frequently assists clients with their accounting questions and has a strong understanding of QuickBooks and other bookkeeping software. Continuously thinking of creative solutions to minimize taxes for his clients and increase client efficiency are two of the many areas where Michael excels. He also enjoys the challenge of researching uncertain or unusual federal and state income tax issues, including being heavily involved with his clients on the PPP loan and forgiveness application process.

Michael has been published in the Delaware Bankers Association's magazine and has presented tax updates at the Society of Financial Service Professionals and at the Delaware Tax Institute.

Professional Affiliations

- American Institute of Certified Public Accountants
- Delaware Society of Certified Public Accountants
- Estate Planning Council of Delaware
- Wilmington Tax Group

Education

- University of Delaware – Bachelor of Arts Degree in Mathematics Education
- University of Delaware – Bachelor of Science Degree in Accounting
- Villanova School of Business – Masters in Taxation

Community Service

- Wilmington Flower Market – Volunteer

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