



**Karly A. Laughlin, CPA AEP®**  
Director – Tax & Small Business



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Karly has more than a decade of accounting experience and a vast knowledge of industry experience. Karly heads 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 attorneys. While Karly has much experience and knowledge in estates and trust, she also provides tax planning, tax preparation, accounting services, and QuickBooks maintenance to high net worth individuals and small businesses.

Karly communicates important law and industry changes as a Keynote Speaker at Belfint Briefings and the yearly Tax Update and attends national conferences such as AICPA ENGAGE, Heckerling Institute on Estate Planning, and the National Association of Estate Planners and Councils. Within the firm, Karly has contributed to the firm's tax and small business blog – [BLS Insights](#) 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
- National Association of Estate Planners and Councils – Board
- Estate Planning Council of Delaware – Secretary/Board Member

## Education

- University of Delaware – Bachelor of Science Degree in Accounting & Finance
- Accredited Estate Planner (AEP®)

## Awards & Community Service

- 2017 CPA Practice Advisor 40 Under 40 Honoree
- Delaware CarePlan – Treasurer
- University of Delaware, Trust Minor – Mentor
- Wilmington Flower Market – Volunteer
- Faithful Friends Animal Society
  - Animal Rescuer

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# We are listening



## Michael D. Kelly, CPA Director – Tax & Small Business



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### Fun Facts

- Walking our adopted Dachshund, Coco
- Playing Chess

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 including shareholder tax planning, 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.

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

### 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 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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