

**VALERIE C. MIDDLEBROOKS, CPA**

**DIRECTOR/DEPT. CHAIR**

**TAX & SMALL BUSINESS**



*We are listening*



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 either in person or via zoom 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 leading the Tax & Small Business department, 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 Series.

## CONTACT

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## COMMUNITY SERVICE

FDelaware Center for Justice – Treasurer

## PROFESSIONAL AFFILIATIONS

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

## EDUCATION & CERTIFICATES

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

## AWARDS & RECOGNITION

- Woman to Watch – Delaware Society of Certified Public Accountants 2012

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**BELFINT • LYONS • SHUMAN**  
Certified Public Accountants

[belfint.com](http://belfint.com) | [info@belfint.com](mailto:info@belfint.com) | 302.225.0600

**KARLY A. LAUGHIN, 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.

## CONTACT

D: 302.593.8203 | [klaughlin@belfint.com](mailto:klaughlin@belfint.com)

## COMMUNITY SERVICE

Delaware Care Plan – Treasurer

University of Delaware, Trust Minor –  
Mentor

Wilmington Flower Market – Volunteer

Faithful Friends Animal Society – Animal  
Rescuer

## 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 & CERTIFICATES

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

## AWARDS & RECOGNITION

- 2017 CPA Practice Advisor 40 Under 40 Honoree

*BLS*

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Certified Public Accountants

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# MICHAEL D. KELLY, CPA

DIRECTOR

TAX & SMALL BUSINESS



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

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 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 the firm's **Insights Blog**. He has presented tax updates for the State of Delaware/IRS, the Delaware Tax Institute, the Society of Financial Service Professionals, various professional trade organizations, and the firm's Belfint Briefing Webinar Series.

## CONTACT

D: 302.229.7866 | [mkelly@belfint.com](mailto:mkelly@belfint.com)

## COMMUNITY SERVICE

Wilmington Flower Market – Volunteer

## FUN FACTS

Dog Rescue Advocate

Beach Enthusiast

Chess Player

## 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 & CERTIFICATES

- 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

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