MAUREEN A. LAMB, CPA

PARALEGAL

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Maureen A. Lamb is a Certified Public Accountant with over 20 years of experience. As a paralegal in Hahn Loeser's Business Practice Area, Maureen manages various aspects of estate administration, including preparation of Ohio and Florida probate court documents, payment of estate expenses, distributions to beneficiaries, transfer of real estate and transfer of business ownership. Maureen provides guidance to executors, trustees and family members throughout the entire administration process.

Maureen assists high-net-worth clients with the preparation of federal estate tax returns, including valuations of estate assets; review and analysis of Last Will and Testament and Trust documents; review of estate debts and administration expenses and calculations for the marital deduction; Qualified Terminable Interest Property (QTIP); allocation of Generation-Skipping Transfer (GST) exemption; and the Deceased Spouse Unused Portability Exemption (DSUE). She has extensive experience preparing descendants' final individual income tax returns and estate income tax returns, extensive responses to IRS audits, trust income tax returns, and distributable net income (DNI) calculations.

Maureen also oversees all aspects of guardianship accounts, including the preparation of probate court documents and review and payment of guardianship expenses. She also provides guidance to court-appointed guardians throughout the guardianship role.

Professional History

- Paralegal, Hahn Loeser & Parks LLP, 2018-present.
- Certified Public Accountant, Taft Stettinius & Hollister LLP, 2015-16.
- Certified Public Accountant, Mansour Gavin LPA. 2009-14.
- Certified Public Accountant, Perry & Karnatz, LLC, 2008-09.
- Certified Public Accountant, Thompson Hine LLP, 2002-08.
- Certified Public Accountant, American Express Tax & Business Services (f/k/a Hausser & Taylor LLP), 1995-2002.
- Club Manager, The Wembly Club, 1992-93.
- Sales Manager, The Fairways Club, 1991-92.
- Business Manager, One Fitness Center, 1983-91.
- Business Manager, Thirteenth Street Racquet Club, 1979-83.
- State Auditor, State of Ohio Auditor's Office, 1977-97.

Licenses

- Certified Public Accountant, State of Ohio, 2000.

Education

- St. Mary's College, B.A., Business and Economics, 1977.

Memberships & Affiliations

- Ohio Society of CPAs, Member.
- American Institute of CPAs, Member.
- Cleveland Museum of Art, Member.

Community Involvement

- St. Mary's College, Madeleva Society Steering Committee, Nomination Sub-Committee, Chair; Member.
- Beaumont School, Athletic Hall of Fame Committee; 2018 Gala, Host Committee, 2018 Beaumont School Golf Outing, Member; 2017 Beaumont School Golf Outing, Co-Chair; Board of Directors, Former Member; Advancing Excellence Campaign, Former Member; Alumnae Committee, Former Member; Planned Giving Committee, Former Member.
- St. Dominic Church, Project Serve Committee; 2018 St. Dominic Church Golf Outing, Member.
- Cleveland Skating Club, Member.
- Shaker Heights Country Club, Member.