



Kerry A. Roets
CPA, MT
Principal
kroets@LumsdenCPA.com

Kerry joined the Lumsden McCormick team in 2018 with 10 years of experience which she began in Denver, Colorado. While in Denver, Kerry spent her time focusing on clients in the real estate industry and other real estate related industries, including family and closely held investment groups and private equity.

Since joining the Lumsden team over 6 years ago, she has continued to expand her knowledge and experience in real estate and pass-through entity taxation, advising on both company operations and individual level compliance and planning. Throughout her career, Kerry has worked with clients in a broad range of areas within the real estate industry, including the hospitality sector, single and multifamily housing, cost segregation studies and historic tax credits.

Kerry's strong client service skills, along with her technical abilities and diverse background, have provided meaningful and positive benefits to her clients over the years.

EDUCATION

University of Denver, Master of Taxation

John Carroll University, Bachelor of Science, Business Administration/Accounting

PROFESSIONAL

American Institute of Certified Public Accountants

New York State Society of Certified Public Accountants

New York Women in Real Estate (NY WIRE), Member

Transformational Leadership Program™ 2024, Convergence Coaching®

COMMUNITY

Stitch Buffalo, Finance Committee, Board Member