

Jonathan L. Roller

CPA

Partner

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Jon has been an active member of the auditing and accounting group for the past twelve years and manages audits, reviews, compilations and consulting services for manufacturers, contractors, other commercial business entities. With extensive experience in planning and performing these services, Jon is responsible for managing fieldwork performed. He also manages the Firm's pre-qualification to perform third-party reviews of tax credit applications for the Film Industry according to agreed-upon procedures established and published by Empire State Development (ESD) and serves as the audit practice leader for the Firm's manufacturing niche. John also serves a variety of exempt organizations.

EDUCATION

State University of New York at Buffalo, Master of Science, Accounting and Operation Management
State University of New York at Buffalo, Bachelor of Science, Accounting and Finance

PROFESSIONAL

American Institute of Certified Public Accountants
New York State Society of Certified Public Accountants
Passed Series 7 and 66 securities exams - Financial Advisor*
Agent for Accident, Life, and Health Insurance
Buffalo Niagara Manufacturing Alliance, Treasurer
Manufacturers Association of the Southern Tier

COMMUNITY

Buffalo Zoological Gardens, past ProZoo Board
United Way of Buffalo and Erie County, Leadership Training

**Securities offered through Avantax Investment Services SM, Member FINRA, SIPC. Investment Advisory services offered through Avantax Advisory Services SM.*