

Paul Jeffrey “Jeff” Drake, CPA
Equity Member

Professional Memberships

American Institute of Certified Public Accountants

Maryland Association of Certified Public Accountants

Maryland Society of Accountants

Academic Preparation

May 1979
University of Baltimore, Baltimore, Maryland, Bachelor of Science in Accounting, Cum Laude

November 1981
Passed Uniform Certified Public Accountant’s Exam

Various
Continuing Professional Educational Courses

BACKGROUND

Since graduating from college in 1979 with honors, Jeff has worked in the field of public accounting. He began his public accounting career with Pelovitz, Title and Matz in 1979. In 1989 Jeff led Pelovitz, Title and Matz’s conversion to computers for accounting and tax processing. In 1991 Jeff made partner and accordingly, the firm changed its name to: Pelovitz, Pelovitz & Drake. Jeff joined Naden/Lean, LLC in 1994 when his firm merged into Naden/Lean, LLC. Jeff made partner at Naden/Lean, LLC in January 2004. Jeff concentrates in tax and auditing with significant experience working with not-for-profit organizations and real estate entities. Jeff has over 35 years of experience with audits, tax representation, estate and trust returns and tax planning.

PRESENTATIONS

- *Fiduciary Responsibilities of Non-Profit Board Members*, Maryland Association of Non-Profit Organizations, October 17, 2007.
- *Fiduciary Responsibilities of Non-Profit Board Members*, Maryland Association of Non-Profit Organizations, June 19, 2007.
- *Real Estate Taxation Issues*, Landlording Course, Baltimore County Community College, April 28, 2004.
- *Accounting and Tax Issues*, Thoroughbred Owners and Breeders Association, New Horse Owners’ Seminar – Pimlico, Maryland, May 16, 2003
- *Estate Tax and Associated Tax Law Changes*, Private Client Seminar with Hodes, Ulman, Pessin and Katz, February 2003
- *Tax Guide to Long-Term Care*, Private Client Seminar with Hodes, Ulman, Pessin and Katz, February 2002
- *Tax Guide to Long-Term Care*, Private Client Seminar with Hodes, Ulman, Pessin and Katz, February 2001