Jeremy Morgan

SENIOR MANAGER | CPA

Jeremy is a partner in the firm's assurance services department with over 15 years of experience. Jeremy provides assurance, consulting, and tax services to clients in multiple industries, including manufacturing, distribution, retail, healthcare, nonprofit, printing, professional practices, service companies, common interest realty associations, and technology companies. Jeremy's areas of specialization include audit and review services for closely held businesses and tax-exempt organizations, accounting consulting and corporate, partnership, and individual tax services.

Jeremy enjoys spending time with his wife and children, often playing games, camping throughout the Midwest, or baking and decorating cakes.

Skills/Practices

- Audits, reviews, and compilations of financial statements for closely held businesses
- Audit services for employee benefit plans, including 401k's and ESOP's
- Audit services for not for profit entities
- Corporate, partnership, and individual tax planning
- Business consulting
- Consulting for ASC 606 – Revenue from Contracts with Customers
- Consulting for ASC 842 – Leases
- Consulting related to internal control procedures and risk assessment
- Internal control policies and procedures
- Controllership services to clients seeking to outsource functions of their accounting department
- Financial planning
- Litigation support and forensic accounting services
- QuickBooks consulting including set-up, maintenance, and accounting support
- Business accounting and bookkeeping services
- COVID-19 assistance and relief programs

Contact Info

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W: weisscpa.com

Education

Bachelor of Science in Accounting
Northern Illinois University

Memberships

Member of the American Institute of Certified Public Accountants

Member of the Illinois CPA Society