



Karen Martin

SENIOR MANAGER | CPA

Karen Martin is a senior manager in the tax department with over 15 years of experience. Karen specializes in estate, gift, trust, family and individual tax planning, consulting, and compliance. She enjoys working closely with clients and their advisors to help them reach their unique estate planning goals, while fostering strong relationships built on trust and personalized service.

Karen is particularly skilled at helping clients navigate the complexities that arise after the death of a loved one. She reviews wills and trust documents, determines whether estate tax filings are necessary or advantageous, consults on funding testamentary trusts, and advises on how to use trust funds to maximize benefits for future generations while maintaining a comfortable lifestyle for the current generation. She finds this work deeply rewarding, knowing it helps provide clarity and peace of mind during challenging times.

Before transitioning to accounting, Karen enjoyed a successful career as a civil engineer. A graduate of the University of Illinois' highly regarded engineering program, she spent five years in the field before realizing that her passion for connecting with people was better suited to a profession where she could combine her interpersonal skills with her love of numbers. Her pivot to accounting was seamless, and she hasn't looked back since.

In her spare time, she enjoys reading, gardening, baking, cooking, and spending time with her family. She and her husband have two daughters who are active in sports, so there are always games to attend.

Skills/Practices

- ▶ Estate, gift, trust, family and individual tax planning and compliance services
- ▶ Succession and wealth transfer for high-net-worth individuals
- ▶ Family office services for high-net-worth multi-generational families
- ▶ IRS, State and local audit representation
- ▶ Private Foundation planning and compliance

Contact Info

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Education

Master of Science in Accountancy,
DePaul University
Master of Science in Environmental
Engineering, University of Illinois
Bachelor of Science in Civil Engineering,
University of Illinois

Memberships

Member of the Illinois CPA Society
Member of the American Institute of
Certified Public Accountants
Member of the Chicago Estate
Planning Council



Weiss & Company LLP

Certified Public Accountants & Advisors

Glenview Office

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