

Steven Bankler

CPA, PFS, Cr.FA, CFF, CGMA

Steven Bankler, CPA, Ltd.

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Profile

A niche firm established in 1977, performing consulting, planning, and tax and financial statement services for closely held businesses and the following:

- Litigation support (both as expert witness and forensic accountant) in all areas of litigation (including business, bankruptcy, estate, and divorce)
- Sophisticated tax and business planning
- Business negotiations
- Estate planning

United States Senate Employee—Hired as sole investigative accountant to provide expert tax and accounting services to the Special Whitewater Committee, February 20 – June 17, 1996.

United States Senate—Pro bono consultant to the Banking Committee's inquiry into Swiss banks' involvement in holding Holocaust victims' assets, December 11, 1996.

Affiliations

American Institute of Certified Public Accountants

Forensic Expert Witness Association

XPX San Antonio (Exit Planners Exchange), Treasurer and Board Member

IRS Practitioner Liaison Member

IRS District Director Liaison Committee (Closed 2000; Charter Member 1987 - 2000)

Texas Society of CPAs

Member, Litigation Services Section

Past Chairman, Taxpayer Education Committee

Past Chairman, Taxpayer Public Relations Committee

San Antonio Chapter of Texas Society of CPAs

Past Chairman, Taxpayer Education Committee

Past Chairman, IRS Communication/Relations Committee

San Antonio Employee Benefit Forum - Closed (Charter Member & Founding Secretary)

IAPA International

Accreditations and Licenses

Certified Public Accountant (CPA)

Personal Financial Specialist (PFS)

Certified Forensic Accountant (Cr.FA)

Certified in Financial Forensics (CFF)

NASD Series 66 License (Investment Advisor)

Chartered Global Management Accountant (CGMA)

NASD Series 7 License (General Securities License)

NASD Series 24 License (General Principal Securities License)

Texas Life and Health Insurance License