



Richard L. Lundy, CPA

Director, Tax & Business Advisory Services

rlundy@gbq.com

614.947.5264



Education

Youngstown State University
B.S., Business Administration,
Accounting

Professional Associations

- American Institute of Certified Public Accountants
- The Ohio Society of Certified Public Accountants

Rich has over 30 years experience in taxation and has extensive expertise in federal, state and local corporate tax and partnership compliance and consulting. Rich's experience includes a significant concentration with middle market companies. Prior to joining GBQ Partners in 1995, Rich spent over 10 years working for Ernst & Young, LLP and 1 year as the Tax Director for Symix Systems, a publicly-held computer software developer. His clients have included Symix and Sterling Commerce, as well as the majority of GBQ's software and technology clients.

Rich has served clients in a wide variety of industries including technology, manufacturing, distribution, construction and professional service organizations. His special area of emphasis has been tax planning and consulting for middle-market, closely-held and entrepreneurial companies. Rich also has considerable experience in providing planning services to S corporations and LLCs/partnerships, high net worth individuals and state and local tax compliance and planning.

Rich also works in the tax area as part of GBQ's Transaction Advisory Services group, and has worked on scores of transactions over the past several years. Proper tax planning can net huge savings, and Rich works on complex transactions involving structuring, due diligence reviews, compensation and stock option issues, NOL limitation calculations and post-transaction integration.

Rich is active in both professional and community organizations, including the American Institute of Certified Public Accountants, the Ohio Society of Certified Public Accountants and Goodwill Industries of Columbus, where he currently serves on the Emeritus Board, having served on the Board of Directors and Finance and Executive Committees for in excess of ten years.