



ALEX KUZMIK

Associate

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SERVICES

Business Services
Corporate & Partnership Tax
Estate Planning
Federal, State, & Local Tax Services
Mergers & Acquisitions
Tax & Wealth Management
Trust & Estate Litigation

EDUCATION

The University of Akron School of Law, J.D.
The University of Akron, B.A.

LICENSED TO PRACTICE

Ohio

OVERVIEW

Alex Kuzmik joined Walter Haverfield's Tax and Wealth Management Group in 2023. His practice focuses on wealth transfer planning for individuals and fiduciaries. He provides income tax planning and estate tax planning for high income earners and high net worth individuals and families; implements estate planning techniques for transferring business ownership, asset protection, and succession planning strategies to minimize tax; and advises small business owners on entity selection, sale, redemption, and liquidation planning.

Prior to joining Walter Haverfield, Alex worked at a Cleveland-based accounting firm, where he focused on trust and estate administration, complex multi-generational family tax issues, strategic retirement planning, and succession planning for closely-held businesses.

Alex earned his Bachelor of Arts and his J.D. from the University of Akron. He has written articles for the Estate Planning Council of Cleveland, Edge Magazine, and Cleveland Jewish News on various tax topics. He has also been a guest speaker at the University Of Akron College Of Business National Tax Conference and the 66th Annual Cleveland Tax Institute.

EXPERIENCE

- Monitors legislation and provides clients with timely advice on tax implications, ensuring compliance and mitigating risk
- Advises clients on estate and gift tax planning, creating efficient strategies to preserve future-focused generational wealth
- Provides guidance on structuring business organizations, offering insights into practices for enhanced tax efficiency
- Counsels businesses and individuals with administrative audits, appeals, and post-appeals mediation and interface with all levels of administrative entities

ASSOCIATIONS

- Member, Ohio Bar Association
- Member, Akron Bar Association
- Member, Estate Planning Council of Cleveland
- Member, Akron Chamber of Commerce
- Member, Fairlawn Chamber of Commerce