



Howard P. Klein, CPA, MST

Citrin Cooperman, LLP
709 Westchester Ave
White Plains, NY 10604
hklein@citrincooperman.com
(914) 949-2990



Howard Klein, leader of the Trust and Estate Group, is a tax partner with more than 30 years of experience in the areas of tax, financial, estate, and succession planning.

Howard's clients include closely held businesses and business owners in a diverse array of industries, including real estate, health care, law firms, apparel, and manufacturing and distribution. He also works with high net worth individuals.

As the leader of the Citrin Cooperman's Trusts and Estate Practice, Howard brings a wealth of knowledge and experience to all facets of planning for growth and the future. He helps clients achieve both their business and personal goals, which are often intertwined. His areas of expertise include business succession planning, retirement planning, employee stock option planning (ESOP's), college financial planning, and creating multi-generational wealth preservation and gifting programs. He also represents clients before various taxing authorities.

Howard's problem-solving approach helps clients overcome the many challenges associated with succession and estate planning. He often collaborates with his clients' other advisors to ensure a holistic approach.

Prior to joining Citrin Cooperman, Howard was the managing partner and co-head of the Trusts and Estate department for a local firm.

Howard has appeared as an expert in the *Westchester County Business Journal* and *Westfair Online*, among other media publications, and has also authored various articles on topics such as estate tax planning. He is regularly engaged as a speaker, moderator, and panelist for various industry forums.