

# Naden/Lean, LLC

A Professional Services Company of  
Certified Public Accountants and Business Consultants

## Paul “Jeff” Drake, CPA

Equity Member

### ***Professional Memberships***

American Institute of  
Certified Public Accountants

Maryland Association of  
Certified Public Accountants

Maryland Society of  
Accountants

### ***Education***

*May 1979*  
University of Baltimore,  
Baltimore, Maryland,  
Bachelor of Science in  
Accounting.

*November 1981*  
Passed Uniform Certified  
Public Accountant’s  
Exam

*Various*  
Continuing Professional  
Educational Courses

### **PRESENTATIONS**

- *Tax Guide to Long-Term Care*, Private Client Seminar with Hodes, Ulman, Pessin and Katz, February 2001
- *Tax Guide to Long-Term Care*, Private Client Seminar with Hodes, Ulman, Pessin and Katz, February 2002
- *Estate Tax and Associated Tax Law Changes*, Private Client Seminar with Hodes, Ulman, Pessin and Katz, February 2003
- *Accounting and Tax Issues*, Thoroughbred Owners and Breeders Association, New Horse Owners’ Seminar – Pimlico, Maryland, May 16, 2003
- *Real Estate Taxation Issues*, Landlording Course, Baltimore County Community College, April 28, 2004.
- *Fiduciary Responsibilities of Non-Profit Board Members*, Maryland Association of Non-Profit Organizations, June 19, 2007.

### **PROFESSIONAL EXPERIENCE**

Since graduating from college in 1979 with honors, Jeff has worked in the field of public accounting. He began his public accounting career with Pelovitz, Title and Matz in 1979. In 1989, Jeff led Pelovitz, Title and Matz’s conversion to computers for tax processing. In 1991 Jeff made partner and accordingly, the firm changed its name to: Pelovitz, Pelovitz & Drake. Jeff joined Naden/Lean, LLC in 1994 when his firm merged into Naden/Lean, LLC. Jeff made partner at Naden/Lean, LLC January 2004. Jeff concentrates in tax and auditing with significant experience working with not-for-profit organizations and real estate entities. Jeff has over 25 years experience with HUD/FHA/CDA audits. Jeff is also the firm’s estate planning guru.

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