

CORPORATE PROFILE

Headquarters

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1-800-TAX-TEAM

Over 30 Locations Nationwide

Our Company

Gilman Ciocia, Inc. (OTC BB: GTAX) is a leading provider of federal, state and local tax preparation services with offices in New York, New Jersey, and Florida. Founded in 1982, Gilman Ciocia caters to middle and upper income taxpayers who face an increasingly complicated tax code and must choose from a growing array of investment options. Gilman Ciocia looks at the whole picture – taxes, investments, retirement, insurance, lending, and estate planning, which allows clients to see their entire financial picture and to understand how wise decisions help them keep more of their money, provide them with a healthy and solid financial outlook, and secure their family's future.

Executive Team

Standing Left to Right:

Ted Finkelstein: Vice President & General Counsel
Allan Page: Director **Carole Enisman:** Executive Vice President,
 Operations **John Levy:** Lead Director **Karen Fisher:** Chief
 Accounting Officer & Treasurer **Edward Cohen:** Director

Seated Left to Right:

Nelson Obus: Director **Michael Ryan:** President & CEO
Jim Ciocia: Chairman of the Board
Frederick Wasserman: Director



Menu of Services

Tax and Accounting Services

- Tax Return Preparation
- Year-Round Tax Planning
- Accounting and Bookkeeping

Financial Planning

- Professional Money Management
- Retirement Planning
- Annuities
- No Load Products
- Discount Brokerage
- Mutual Funds

Insurance

- Life Insurance
- Health Insurance
- Disability Insurance
- Wealth Transfer
- Long-Term Care

Third Party Services

- Estate Planning
- Healthcare Proxies
- Wills / Trusts

Financing

- Residential Mortgages
- Commercial Mortgages
- Reverse Mortgages
- No Load Products
- Equipment Leasing

- Gilman Ciocia, Inc. is a Registered Mortgage Broker with the NYS Banking Department.

- GC Capital Corp. is a licensed Mortgage Brokerage Business with the Florida State Banking Department.

- GC Capital Corp. is a wholly-owned subsidiary of Gilman Ciocia, Inc.

- Loans arranged through Third Party Lenders.

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The Power of a Personal Tax Team

Gilman Ciocia's approach to your taxes is unique. It's year round tax planning with a Personal Tax Team comprised of an accountant, investment advisor, lender and an estate planner. Now's that's Power. And our goal is simple – lower your taxes and increase your wealth.

At Gilman Ciocia, we're changing the way you think about your taxes.

Fast Facts

■ Gilman Ciocia is ranked # 4 in the 2008 edition of *CPA Wealth Provider Magazine's* Billion Dollar Club of Assets Under Management

■ The firm was recognized among the Top 40 accounting firms nationwide in 2006 by *Accounting Today Magazine*

■ Gilman Ciocia is a member of the National Association of Tax Professionals

■ Gilman Ciocia is a proud sponsor of the New York Mets

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