



HEATHER L. MARTIN, CPA

PRINCIPAL
hmartin@heathermartincpa.com

EDUCATION & CREDENTIALS

Bachelor of Science in Accounting

University of Tennessee

Master of Accountancy in Taxation

University of Tennessee

Certified Public Accountant (CPA)

Licensed in the state of Tennessee

PROFESSIONAL ORGANIZATIONS

American Institute of Certified Public Accountants

Tennessee Society of Certified Public Accountants

Past Board of Directors

Past Young CPA Committee

Knoxville Estate Planning Council

Member

Fairview Advisory Board

Board of Directors

Blount County Habitat for Humanity

Past Board of Directors

Past Treasurer/Secretary

Past Finance Committee

Past Family Selection Committee

Past Financial Mentor

Knoxville Opera

Past Board of Directors

Past Treasurer

Heather has over 25 years of experience assisting both businesses and individuals with their tax and financial needs. She ensures clients have meaningful financial information for making decisions, whether related to financial operations or tax compliance. She has experience with several entity types, including LLCs, S Corporations, and sole proprietors. Her areas of focus include tax planning, business operations, and implementation of tax and business software packages. She serves many industries with a specialty focus in real estate and construction issues. A Certified Public Accountant, Heather earned both bachelor and master's degrees in Accounting at the University of Tennessee. She has served in various board positions largely in financial roles during her career. She started her firm in 2019 after almost 20 years working at a large public accounting firm in Knoxville, TN.

PROFESSIONAL PROFILE

- Ensuring the accurate filing of federal and state tax returns for businesses and individuals, including trust and gift tax filings
- Ensuring the accurate preparation of business financial statements on a monthly and/or annual basis
- Assisting clients with quarterly estimated tax payment calculations
- Assisting clients with implementation of various software packages, including Quickbooks, Peachtree, and MAS90
- Serving as controller for clients on either an interim or indefinite basis; overseeing the financial operations of businesses
- Assisting clients in the real estate and construction industries with filings and planning necessary for bonding and licensing purposes, including 1031 exchanges
- Assisting clients with cash flow planning and management as it relates to business and tax needs
- Assisting with various tax planning strategies such as mergers, acquisitions, divisions, and sales of businesses, including due diligence procedures for both buyer and seller
- Monitoring and assisting clients with general business and tax filings including business license returns, tangible personal property returns, and quarterly and annual payroll tax filings such as Forms 941, W-2, and 1099
- Consulting with clients on various financial reporting and general business issues such as business formation and selection of entity type
- Assisting clients with determining estate tax needs, including gifting strategies, trust set-up, and probate issues, in conjunction with attorneys