

# Jonathan D. Swartz

## PARTNER



Jonathan Swartz is a Partner in Bennett Thrasher's Personal Financial Services practice. He has experience providing financial advice to attorneys, corporate executives, family business owners and other high net worth clients on income tax, estate and gift tax, investment, insurance and retirement planning. Additionally, Jonathan has experience in individual, partnership, S corporation,

foundation and fiduciary income taxation.

Prior to joining Bennett Thrasher, Jonathan worked for the Atlanta office of KPMG LLP as a Senior Tax Manager in the Private Client Advisory Services (PCAS) practice.

Jonathan is a Certified Public Accountant (CPA) licensed in Georgia, Certified Financial Planner (CFP®) and Personal Financial Specialist (PFS).



### CONTACT

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### PRACTICE AREAS

Individual Tax  
Tax Planning & Consulting  
Trusts & Estates Planning



### INDUSTRY EXPERIENCE

High Net Worth Individuals  
Nonprofit



### EDUCATION

Master of Taxation, Georgia State University  
Bachelor of Business Administration (Accounting),  
Emory University



### PROFESSIONAL AFFILIATIONS

American Institute of Certified Public Accountants  
(AICPA)  
Atlanta Estate Planning Council  
Georgia Society of CPAs (GSCPA)



### COMMUNITY INVOLVEMENT

Balser Professional Advisor Council  
Emory University Gift Planning Advisory Council  
Epsilon of Kappa Alpha Alumni Advisory Board  
Jewish Federation of Greater Atlanta  
Philanthropic Advisor Leadership Institute  
Temple Sinai