

## Miriam Kaplan, CPA, MBA

Partner, Advisory Services



### Resident Office

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### Range of Experience

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Miriam joined Windes in 2022 and is a partner in the Advisory Services practice. She specializes in financial management and reporting, budgeting, variance analysis, financial key performance indicators, financial ratio analysis, and performing due diligence for M&A transactions.

Miriam's professional focus is to help identify the unique needs of the client and work with the Advisory Services team to provide effective and transparent reporting. Miriam assists her clients in utilizing financial reporting to provide insights into their organization's financial health, including liquidity, solvency, profitability, and operating efficiency.

Miriam brings to Windes an extensive breadth of experience as an operations director and financial controller. During Miriam's 15 years of experience, she has served individuals and organizations in wholesale, retail, real estate, healthcare, and professional services.

Drawing from her own experience, Miriam produces customized financial reports that can help business owners and stakeholders identify opportunities for growth and cost savings and improve the overall financial health of their organizations. Her direct experience as a controller and operations director provides her with an understanding of the key factors that drive organizational success.

### Education

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Bachelor of Science, Business Administration  
*Touro College, Los Angeles, California*

Master of Business Administration  
*Touro University, Los Alamitos, California*

### Community and Professional Affiliations

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- American Institute of Certified Public Accountants, *Member*
- California Society of Certified Public Accountants, *Member*
- San Fernando Valley Counseling Center, *Board Member*