

## ABOUT THE AUTHORS



Allison McLeod

Professor McLeod is currently a full-time Senior Lecturer at the University of North Texas, teaching classes in Corporate Income Taxes, Individual Taxes, Tax Research, Ethics and Financial Accounting. She also practices law part-time with the Dallas firm Grable Martin Fulton and taught as an adjunct professor at the University of North Texas College of Law. Prior to Professor McLeod going into academia, she worked for 18 years in industry and in a Big Four accounting firm. Professor McLeod earned a law degree from Baylor School of Law, and an LL.M. degree in Taxation from Southern Methodist School of Law. She has been a licensed CPA since 1993 and has been licensed to practice law since 1992. Professor McLeod has enjoyed teaching live ethics course to CPAs since 2011 and is the owner of [www.cpaethicsonline.com](http://www.cpaethicsonline.com), which offers on-line self-study courses to CPAs.



Barbara Weltman

Barbara Weltman, JD, has written extensively on a wide variety of tax, small business, and financial planning matters for both professionals and the general public. The Wall Street Journal called her "the guru of small business taxes." She is the co-author, along with Sidney Kess, of CCH's Individual and Small Business Tax Planning Guide and CCH's Retirement Planning Guide and a number of self-study programs for CCH. She is publisher of Big Ideas for Small –Business®, maintains a small business information Web site at [www.barbaraweltman.com](http://www.barbaraweltman.com), and is the host of Build Your Business Radio. Ms. Weltman is a graduate of Brooklyn Law School.



Klaralee Charlton

Klaralee Charlton is a Shareholder with Katz, Look & Onorato, P.C. She practices fiduciary tax, estate administration, and business transactional law. As part of her practice, Ms. Charlton guides clients through the process of administering a loved one's estate including the collection, valuation, management and transfer of assets including financial accounts, real estate, and business interests with a focus on minimizing estate and income tax liability. She also works closely with trustees of ongoing trusts to ensure compliance and prepares clients' fiduciary income tax returns annually.

Klaralee has written and lectured on topics including estate and gift tax, fiduciary income tax reporting and U.S. regulations governing the valuation of small family businesses. She is an active member of the Colorado Bar Association, Tax Section and the Greater Denver Tax Counsel Association.

She earned her J.D. in 2011 from the University of Utah, S.J. Quinney College of Law, her LL.M. in Tax Law from the University of Denver in 2013, and her B.A. in political science in 2009 from Bryn Mawr College. She is admitted to practice in both Colorado and Montana.