



PRINCETON NJ – KB Financial Companies, LLC, a Princeton NJ based Financial Services Organization, is pleased to announce it has recently appointed Chris Velis to lead its Tax & Accounting Services division as Managing Director. In his role, Chris will enhance and streamline operations and tax procedures to better serve our sophisticated, complex clients.

Chris started his career at PwC and has since held various senior, supervisory positions at regional accounting firms in NY, NJ, and PA. His technical background includes high-net-worth individual tax, estate/trust, partnership and corporation tax planning and compliance. Chris is an experienced CPA and a member of the American Institute of Certified Public Accountants and the Pennsylvania Institute of Certified Public Accountants. He received his MBA, MS in Taxation, and BS in Accounting from Philadelphia University.

“With 15+ years in the industry, Chris has developed an extensive knowledge base that will be a valuable resource for our clients,” says James Kaplan, CEO of KB Financial. “In welcoming Chris to KB, we are adding to our current capabilities so we can more effectively leverage and coordinate the diverse offering our team provides.”

According to Mr. Velis, “One of my favorite responsibilities as a CPA is understanding my clients’ family dynamics. We are able to add more value when dealing with family succession issues for a business and trust & estate planning for the family.” Chris has helped fill that void as a tax & accounting specialist with the unique ability to address such challenges.

ABOUT KB FINANCIAL COMPANIES

With roots dating back to 1983, KB Financial Companies, LLC is comprised of a team of highly qualified individuals in financial, tax and estate planning, insurance solutions, wealth management and merchant banking offering a variety of family office services to a diverse client base. We are dedicated to assisting our clients in the pursuit of their goals – whether that means growing and preserving family wealth for future generations or monetizing an interest in a closely-held business. Our integrated approach increases our ability to add significant value for entrepreneurs, high net worth individuals, their family and business interests. KB Financial services clients through offices in Princeton, NJ and Point Pleasant Beach, NJ.