

KAROLIS MATULIS

Principal | CPA, CITP, CVA

Karolis is the Practice Leader of the firm's Mergers & Acquisitions group, bringing over a decade of experience advising business owners through the decisions that define their companies — from formation and growth through exit. Whether a client is structuring a partnership, navigating a transaction, or planning a succession, Karolis serves as a trusted advisor across the full business lifecycle.

His M&A and transaction advisory practice spans buy-side and sell-side engagements, including deal structuring, tax modeling, financial due diligence, quality-of-earnings analysis, pricing and valuation, and purchase price allocations. This transactional lens is complemented by deep expertise in business valuation for gift and estate planning, shareholder disputes, and other complex scenarios requiring defensible, well-supported conclusions.

Karolis pairs his advisory work with a forward-looking approach to how firms and their clients operate. He leads the firm's Innovation Council, driving digital transformation initiatives, technology implementation, and process improvement — and applies data analytics to help clients identify the KPIs and insights that sharpen decision-making.

Karolis brings concentrated industry experience in real estate, advising closely held entities, joint ventures, and syndications on the tax, process, and transactional issues unique to that space. He also serves clients in the healthcare and technology sectors, and has developed a recognized practice around digital assets — including stablecoins, NFTs, tokens, and DeFi — helping owners navigate the evolving tax and regulatory landscape.

Across all engagements, his work is grounded in a strong command of partnership taxation, including complex multi-tier structures, and extends to general tax compliance and planning for closely held businesses and their owners.

Karolis has been with the firm since 2013.

PROFESSIONAL AFFILIATIONS & CIVIC ACHIEVEMENTS

- 2020 Recipient, New Jersey Society of Certified Public Accountants (NJCPA) Ovation Award for Innovation
- Chair, NJCPA Emerging Technology Interest Group
- Member, American Institute of Certified Public Accountants (AICPA)
- Member, NJCPA
- Member, National Association of Certified Valuators and Analysts (NACVA)



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PRACTICE AREAS

- Mergers & Acquisitions
- Technology Services
- Data Analytics
- Real Estate
- Partnership Taxation
- Business Valuation
- Litigation Support
- Cryptocurrency & Digital Assets

LICENSES & CERTIFICATIONS

- CPA License: New Jersey
- CVA: Certified Valuation Analyst
- CITP Certified: Information Technology Professional

EDUCATION

- Bachelor of Science in Accountancy, The College of New Jersey