

Lorie Fale

My favorite quote to live by is from Wayne Gretzky: “you miss 100% of the shots you never take.” After 24 years at PwC where, as a partner, I led the firm’s Florida state and local tax practice, I now focus my attention solely on state tax consulting/controversy work at Akerman LLP. My enjoyment of state tax stems from the ability to use my creativity and technical skills to develop strategic, innovative and implementable opportunities for my clients. I am passionate about learning my client’s operations and needs to find optimal solutions for seemingly insurmountable problems. Clients have expressed appreciation for my upbeat demeanor and sincere willingness to resolve issues in a manner that consistently achieves positive outcomes.

I have 25+ years' experience as a state tax controversy specialist (primarily focused on Florida), dealing with all aspects of state tax audits, refunds, and assessment management – as well as experience with multistate income tax consulting. My prior CPA experience provides me with the accounting experience that enables me to fully understand the impact of state tax opportunities and exposures on a client’s budgets, forecasts, reserves, and financial statements. In order to deliver the best resolution to a tax issue for my clients, I combine innovation, relationships built on trust, and technical expertise - this approach inspires confidence with my both my clients and colleagues. One of my clients stated: “Lorie is full of color, life, and good ideas. She is a solid value proposition with a little bit of fun!”

My love for adventure is a thread that runs through both my personal and professional life. Traveling to many countries throughout the world has given me the opportunity to gain a broad global perspective, and it has enabled me to create meaningful experiences for my family.

Education

J.D., University of Miami, 1998

B.S., University of Maryland, 1991

Bar Admissions

Florida

CPA Licenses

Florida

Maryland

Areas of Experience

Corporate Tax

Financial Services

State and Local Tax Consulting

State and Local Tax Litigation and Controversy

<https://www.linkedin.com/in/lorie-mcdonald-pwc/>

(305) 582-7436