



Philip T. Straley, CPA/PFS

Areas of Expertise

- Financial, Estate and Tax Planning
- Investment Advisory
- Governmental Auditing and Consulting
- Charitable Giving/Planning
- Employee Fringe Benefits Consulting
- Business Consulting

Current Position: Shareholder

Phil joined Straley, Ilsley & Lamp, P.C. in 1983. In addition to providing investment advisory services, estate and tax planning, Phil also has a strong background in pension plan design and other employee fringe benefits. He has provided audit services to governmental units, school districts and colleges. He provides tax and consulting services to professional services groups (attorneys, dentists, doctors, veterinarians). In addition to being a licensed CPA, Phil is also an investment advisor representative with 1st Global Advisors Inc., holding both the series 66 and 7 security licenses. He holds the Personal Financial Specialist (PFS) accreditation awarded by the AICPA.

Prior to joining Straley, Ilsley & Lamp, Phil worked six years as an educational specialist with the U.S. Veterans Administration providing technical interpretations and advice under the GI Bill to colleges and universities. He also worked two years for Ferris State University under the Office for Academic Affairs.

Phil earned a Masters Degree from Eastern Michigan University, majoring in Political Science with minors in Economics and History. He completed an additional three years beyond this level pursuing accounting studies. He has completed and been awarded the AICPA Certificate of Educational Achievement for Governmental Accounting and Auditing.

Professional and Community Organizations:

- Financial Services Institute
- Michigan Association of Certified Public Accountants
- Personal Financial Planning Section Member
- Alpena Lions Club
- Ducks Unlimited, Thunder Bay Chapter, Past President
- Alpena Country Club, Past President
- American Institute of Certified Public Accountants
- Church Council Member

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