

CARTER HEIM BIOGRAPHY



CARTER HEIM

Carter's passion to help leaders build strong, sustainable, growing companies, results in successful futures for the leaders and team members. His unique combination of leadership and business, among other expertise, assists his clients in charting the courses for their businesses and organizations.

Clients benefit from his extensive knowledge of leadership, strategic thinking, business, governance, accounting, and tax, honed by more than 30 years in the industry. He seeks to work with leadership teams committed to scaling sustainable, growing organizations.

A 7 Attributes of Agile Growth® certified executive coach, Carter uses these tools to assist business leaders in building and executing their plans. Carter has assisted many clients in building value, buying/selling businesses, and saving millions of dollars in income and estate taxes.

His involvement in chairing the Maryland Association of CPAs, the Anne Arundel Community College Foundation Board of Directors, and other leadership and governance roles help Carter bring a unique perspective to each client and organization. His participation serving on the boards of directors of BankAnnapolis, a publicly traded bank, and the American Institute of CPAs also add context and insight.

Executive Summary

Carter Heim is the CEO of HeimLantz, a business advisory and accounting firm, that has been working with a coach for five years. Recognized as one of the top 100 Accounting Firms to Work for in the U.S., its team of talented professionals helps organizations and businesses and their owners create value. *Making lives better* for the firm's clients, team members and community is the firm's purpose.

Industry Specialties

- Professional Services
- Technology
- Construction
- Government Contractors

Coaching Specialties

- Executive & Business Coaching
- Leadership Team Building
- Strategic Planning

Specific Expertise

- Leadership and Governance
- Business Succession
- Creating sustainable cultures
- Estate and Income Taxes
- Business and Tax Planning

Current

- CEO, HeimLantz
- 7 Attributes of Agile Growth® Certified Executive Coach
- Treasurer & Trustee, Chesapeake Bay Trust
- Corporator, St. Mary's Church

Past

- Founder, Heim & Associates
- Co-Founder, Hammond & Heim, Chartered
- Chair, Maryland Association of CPAs
- Chair, Board of Directors, Anne Arundel Community
- Chair, Board of Trustees, St. Mary's School
- Board of Directors BankAnnapolis
- Treasurer, Board of Directors Anne Arundel County Chamber of Commerce

Education

- MS in Taxation, University of Baltimore
- Bachelor's in Accounting, University of Maryland
- Certified Public Accountant
- Certificate of Educational Achievement in business valuations, AICPA
- Certified in Financial Forensics, AICPA
- Chartered Global Management Accountant, AICPA

