L.K. BENSON & COMPANY

Wealth is the Ability to Fully Experience Life

True wealth can't be defined by a number.
We look beyond the numbers to help you live the life you desire.

ABOUT US

WHY WORK WITH US

WHERE WE STARTED

WHAT WE BELIEVE

GOING DEEPER

You have questions about your finances. You've looked online and asked friends but you can't find the right answer. That's because there is no universal right answer. Real financial advice is personal and requires an understanding of your unique situation. We develop deep personal relationships with our clients so we can help you determine the right answer.

PEACE OF MIND

The most important thing we can provide for you is peace of mind. We understand how frustrating and complicated it is to manage your personal finances. Our technical expertise allows us to tackle the complex issues for you and communicate them in a straightforward manner. We want to help you develop a plan for your future and reduce the stress that finances might be causing you.

OBJECTIVE ADVICE

Book a meeting

How We Help - L.K. Benson & Company

Lyle K. Benson, Jr., CPA/PFS, CFP

PRESIDENT & FOUNDER

Chris Benson, CPA/PFS

PRINCIPAL

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Kelly Sheehan

OPERATIONS MANAGER

Rosemary Parkinson, CPA

TAX DIRECTOR

Nelson Tucker, CPA

TAX MANAGER

Joey Riesett

FINANCIAL PLANNING ASSOCIATE

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Julia Kline

INTERN

INDEPENDENT, OBJECTIVE ADVICE

FOCUSED ON YOU AND YOUR GOALS

SERVICES

WHERE IT ALL STARTS

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- Analyze your cash flow needs
- Organize your financial accounts
- Review your investment portfolio
- Assess your tax situation
- Develop specific recommendations to help you meet your goals

Financial Planning - L.K. Benson & Company

TIME IS MORE VALUABLE THAN MONEY

YOU CAN GET MORE MONEY BUT YOU CANNOT GET MORE TIME

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FINANCIAL PARTNER

TRANSITION PLANNING

SERVE AS YOUR PERSONAL CFO

NAVIGATE TAX COMPLEXITIES

WHAT WE DON'T DO

We understand how valuable your time is and our goal is to help you free up more of it by being your financial partner. We work with people in all stages of life, with many different occupations and varying levels of net worth. Our fee structure allows us to work with a wide variety of clients but there are certain people in particular situations who we feel we can help the most.

Who We Help - L.K. Benson & Company

STRIVE TO DEVELOP

PERSONAL FAMILY RELATIONSHIPS

WITH THE CLIENTS WE SERVE

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BLOG

JUNE 25, 2019

Learning in Las Vegas

I recently attended the American Institute of CPA's' (AICPA) annual mega conference ENGAGE, which is a consolidation of several different technical conferences. My focus is always on the Advanced Personal Financial Planning track, but with sessions on Advanced Estate Planning and Tax Strategies for High-Income Individuals, there is an incredible amount of high quality content crammed into just a few days. Much of that content is technical in nature and more suited to practitioners, but I had a number of takeaways to share

JUNE 20, 2019

Will We See More Changes to Retirement Savings?

Given the sharp political divide in our country right now, it's rare to see legislation that enjoys widespread bipartisan support. Yet in May, the House voted on a bill that would make substantial changes to our retirement system, and it received near unanimous support. The SECURE (Setting Every Community Up for Retirement Enhancement) Act of 2019 passed in the House of Representatives in a 417-3 vote, but the bill has stalled in the Senate as legislators debate some of the key provisions.

MAY 24, 2019

The Nature of Life is to Change

In recent years, we have had the opportunity to travel to some amazing parts of the world. From the Seregenti in Tanzania, the Bocas del Toro Islands in Panama, and the Lofoten Islands in Arctic Norway, there seems to be a direct correlation between the level of difficulty to get to a destination and the perspective that destination provides. We recently spent a week in the Galapagos Islands off the coast of Ecuador, one of those places that takes a lot of travel to get to, but which affords an incredible perspective on life once you are there.

MAY 24, 2019

I "Lost" $10,000 This Weekend

I grew up around horses. My grandparents owned a horse farm and my uncle trained and rode horses. I've been going to horse races since I was born and the third weekend in May is always blocked off on my calendar for Preakness.

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more difficult filing deadlines we've had in recent memory. There were two big factors that contributed to this...

APRIL 12, 2019

2019 Q1 Market Commentary

Our 2018 year-end market commentary spent some time discussing the sharp contrast between 2017 and 2018 as nearly every asset class ended in negative territory for 2018 compared to positive returns across the board in 2017. In a case of history repeating itself, we could have the same discussion today about the first quarter of 2019 compared to the 4th quarter of 2018. The market is off to a phenomenal start to 2019 with strong returns everywhere you look. Just look at these numbers...

View All

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HELPING FAMILIES

GENERATION AFTER GENERATION

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Tax Caddy

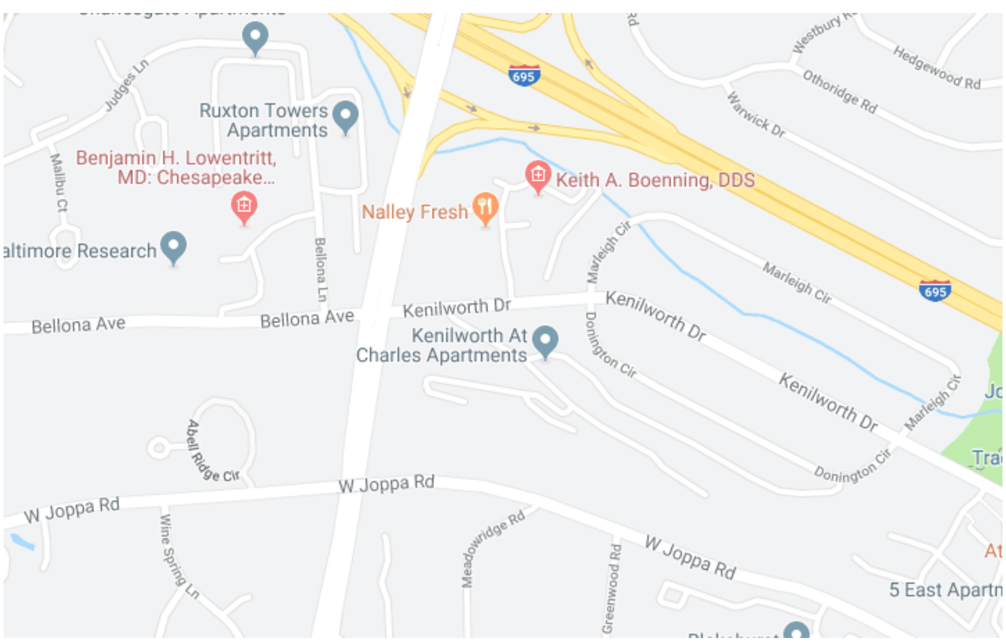
Schwab

Black Diamond

GIVE US A CALL

FIND OUT HOW WE CAN HELP YOU

CONTACT US



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