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Check-up

Earlier in the year, we
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By Carrie Beren
June 29, 2018

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your income tax
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individuals and
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While this high federal
exemption level
means that very few…

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Alice In

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My client, Alice, came
in for her semi-annual
review meeting
recently and said (as
many clients do), “I
don’t like paying
taxes.” Good news:
You only pay taxes
when you’ve made
money. But that does
not mean you should
not try to minimize
your taxes as much as
possible. In Alice’s
case, she was
transitioning…

By Jake Mason
June 5, 2018

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What Does It Mean To Be A

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While the �nancial
services industry
evaluates the
Department of
Labor’s Fiduciary Rule
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�duciary standard
itself has long been
the norm for
Registered Investment
Advisors such as
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in keeping with
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By Michael Green
December 4, 2017

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The Bene�ts of Coordination Between CPA and Financial Advisor

I have been a �nancial
advisor for more than
30 years. During that
time, I have worked
with clients who have
prepared their own
taxes, those who
work with CPAs I have
never spoken to or
worked with, and
those who work with
CPAs with whom I
have a professional
relationship. My
preference is to
develop a working
relationship with the
client’s CPA because I
�nd it to be the most
bene�cial for the
client.

By Mindy Gasthalter
October 25, 2017

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Does Offering
Wealth

Management
Create A Con�ict Of Interest?

One frequent concern
accountants have
when considering
o�ering wealth
management is
whether or not such a
move would create an
ethical problem or a
con�ict of interest.
The American
Institute of CPAs’
(AICPA) Code of
Professional Conduct
states that an
accountant cannot

refer a product or
service to a client for
a commission if the…

By David Kau�man
September 18, 2017

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Selecting The Right
Securities License

2017

2017

May

4

In our last blog, we
explored the most
common types of
business models
available to CPAs. In
our blog below, we
outline the licensing
and registration that
is required for the
three business
models.

By John Riina
May 4, 2017

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