Individual & Family Tax Services

Income Retention & Growth Strategies

It is never too early or late to start a tax or investment plan. Our tax and investment professionals remain current on changing tax incentives, regulations and wealth strategies to help you maximize any potential benefits. We will customize a strategy based on your unique financial position. Our goal is to provide peace of mind.

Examine Your Tax Strategy

Are you getting advice or just having your tax return filed for you? Let our tax professionals review your returns, ask some questions and see how we can help. Unfortunately, tax benefits can be missed if you are using an accountant who is not providing any tax planning. While preparing tax returns is often about quantifying the past, we are always looking forward to the future for our clients. Our professionals are experienced in supporting both individuals and executives in tax planning and income retention strategies.

Providing Peace of Mind

Our team remains current on changing tax incentives, regulations and wealth strategies. Our advisors have many years of experience customizing income tax strategies that can maximize potential incentives, strategically minimize tax exposures and ensure compliance.

Individual Services Include:

- Tax Planning & Preparation
- Estate, Trusts, Beneficiary Taxation & Gifting Strategies
- Retirement Strategies
- Financial Planning
- College Planning & Retirement Strategies
- Retirement Projections
- Second Home Purchase & Major Asset Decisions
- Stock Option Strategies
- Goal Setting
- Wealth Transfer & Family Wealth Strategies
- Foreign Asset Reporting & Compliance
- Private Foundations & Other Charitable Vehicles
- Major Asset Decisions
- Divorce & Support Issues

The Next Step

Take the first step and call our office at (814) 536-7864 to see what our firm can do for you.

Wessel & Company
Accountants & Advisors

www.wesselcpa.com

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