



Go one place for Financial Advice, another for taxes and yet another for investments; do they even talk together ? This is a crazy way to work.

Thirty years ago, I had a different idea. Financial Planning , Investments and taxes are so completely intertwined that you can not efficiently separate them.

Most Financial Planning firms do not prepare tax returns. Most CPA's do not do Comprehensive Financial Planning. Investment Brokerage Firms do neither. We have always believed this is a mistake, too many cracks for ideas and information to drop through between plan and implementation. Over the years we have saved hundreds of thousands of dollars for our clients because we see the big picture and give coordinated advice.

We collectively have over fifty five years experience preparing tax returns for individuals, trusts and partnerships. Currently, we provide tax services to approximately 250 families throughout the US. For FSI on-going, advisor relationships, tax preparation is included in our offering of complete service.