

B | T PERSONAL FINANCIAL SERVICES

CONTACTS

Jeff Call, CPA, PFS, CFP®, *Shareholder*
Director of Personal Financial Services
678.302.1456
jcall@btcpa.net

Jonathan Swartz, CPA, PFS, CFP®
678.302.1477
jswartz@btcpa.net

WHO WE ARE

Our Personal Financial Services team is comprised of independent, fee-only advisors credentialed as CPAs, Certified Financial Planners™ and Personal Financial Specialists.

We provide objective advice that assures your personal matters are being handled by professionals with the highest levels of technical expertise and without any conflict of interest.

WHAT WE DO

You can count on our personal advisors for a comprehensive approach to personal wealth management integrated with your overall personal tax planning. Our deeply experienced team routinely provides trustworthy advice on issues ranging from retirement planning, gift and estate planning, investment management and planning, life insurance planning, tax compliance for trusts and estates, and business succession planning.

Throughout, we proactively handle the details and coordinate with all of your advisors to ensure that the financial plan is implemented as proposed. This high level of personal service will allow you to focus on your business and other personal interests.

Through active listening and resourceful planning, our Personal Financial Services team enables you to make wise personal financial decisions that can preserve your family legacy and values for future generations.

Continued on back

PERSONAL FINANCIAL SERVICES *(continued)*

Our unbiased personal financial services include:

- Investment advisory
- Financial planning
- Wealth transfer solutions
- Charitable giving
- Risk management and insurance

HOW WE MANAGE YOUR ENGAGEMENT

At the outset of the relationship and again at various milestones, the Personal Financial Services team will conduct an extensive assessment of your complete financial situation. From this analysis and subsequent discussions, the team prepares recommendations designed to assist in managing your personal financial situation and improving financial performance.

You benefit from our extensive experience with business owners and high net worth families. Our team meets weekly to share best practices and leading edge ideas that can benefit all of our clients. In addition, the team collaborates within Bennett Thrasher on international and corporate tax matters, valuation, and financial reporting issues.

THE VALUE YOU RECEIVE

Our objective fee-only advisory status ensures that you receive our best advice and recommendations with no conflicts of interest. That translates into a comfort level that truly adds value. In addition, our broad firm experience contributes intelligence and knowledge on the range of financial issues and opportunities resulting in a more comprehensive approach to personal financial planning.

Experience **Better Together**.