

personal tax & wealth management

At HLB Tautges Redpath we apply a unique combination of business knowledge, accounting skill and tax planning expertise toward helping clients achieve their financial goals sooner.

Personal Tax Planning and Preparation

When you hire an accounting firm to prepare your income tax return, your expectations should be high.

Extensive knowledge of complex tax laws equips us to deliver comprehensive, expert personal income tax advice. We will help you maximize tax savings while minimizing risk. Our advisors will evaluate your overall tax situation and provide proven solutions to defer or reduce your personal taxes. We also can help you increase personal cash flow, plan for retirement, fund a college education or achieve other financial goals.

For more information, contact Sue Weiskopf-Larson, MBT, CPA, at 651.407.5893 or sweiskopf@hlbtr.com

Wealth Management

When planning for your financial future, it's important to evaluate all of your assets, liabilities, commitments and goals to make sound decisions. We help clients understand their overall financial picture and give recommendations based on our evaluation. Since we do not take our clients' assets under management, our consultation is always unbiased. You can count on personal attention, diligent service and independent, ethical advice when you work with us.

For more information, contact Katie Haskins, MBT, CPA, at 651.407-5883 or khaskins@hlbtr.com

Specialized Services

- Stock option planning
- IRS representation
- Retirement planning
- College funding
- Cash flow analysis and budgeting
- Insurance analysis
- Investment analysis

