



WHERE YOUR WEALTH IS CONCERNED, THE RIGHT RELATIONSHIPS ARE EVERYTHING.

The financial lives of successful people can often be very complicated and choosing the right experts to preserve and build on your net worth can sometimes be equally challenging. Finding the right partners who care about more than just the fundamentals means choosing partners who are invested in keeping your future on course. At RSJ, we see your financial life in total and as an extension of who you are. That's why your financial and business life is as personal and important to us as it is to you.

Going beyond just the basics of accounting and wealth planning, our experts possess an array of highly developed capabilities designed to address the complex issues raised by significant wealth. Our team of dedicated professionals will work with you and your personal advisors to develop a wealth plan tailored to your unique circumstances. Our full range of services from income tax planning and compliance, asset preservation, risk management, charitable and philanthropic

planning, retirement and education funding, as well as wealth transfer and estate planning, are designed to help our clients maintain and grow their wealth.

As tax priorities change throughout your life, it's important to ensure you have the right tax experts to help you achieve what's most important to you. We will provide you with sound counsel, customized solutions, individualized attention and proactive advice. RSJ will help you understand how these changes might impact your decision-making and focus on your advantages and opportunities.

Whether you have recently inherited wealth, are a working couple, individuals in mid-life building wealth and planning for retirement or a retired individual focused on gift and estate planning, RSJ will address your needs as you transition through life.

Individuals of Wealth

WE KNOW IT IS NOT JUST ABOUT MONEY ... IT'S ABOUT HAPPINESS, SECURITY AND CONFIDENCE.

RSJ'S EXPERTS WILL GUIDE YOU THROUGH THE MAZE OF COMPLEX TAX ISSUES WEALTHY INDIVIDUALS FACE, TO HELP YOU SECURE YOUR FINANCIAL FUTURE AND THE LIFE YOU DESIRE.

Rose, Snyder & Jacobs LLP
ACCOUNTANTS & ADVISORS



Individuals of Wealth

How You Benefit by Working with RSJ

Money and finances are very personal subjects. Subjects WE take very personally. *It's not about what we do, it's about what you get.*

We believe that real service is not just knowledge you pay for, but a partnership that goes beyond expectation to include quality, integrity and commitment.

When you work with RSJ's professionals, you get more than just accounting; you get the wisdom and experience of a large firm with the personal attention of a boutique organization. You get a suite of services that address a wide range of personal wealth challenges. And beyond that, you get dedicated knowledgeable experts with a whole lot of heart.

Strategically building and managing wealth is never a one-size-fits-all strategy. So we never try to fit you into some basic ready-made solution. We value your input and listen closely to your goals and needs; we tailor our financial solutions to meet those needs.

When you have RSJ on your advisory team, you get not only our extensive knowledge of state and federal tax compliance and an understanding of the intricacies of filing multi-state returns, but also partners who will represent you in an IRS audit, should that prove necessary, or help you address any ongoing issues. Taking into account all aspects of managing your wealth, we use a broad portfolio of accounting and financial services to not only plan and prepare your taxes, but to work closely with you and your advisors to maximize your financial future.

Still think all accounting firms are the same?

Then it's time you experienced Rose, Snyder & Jacobs, and see the difference.

Contact Us – We invite you to Success.

Services

Tax

- *Federal, State and Local Tax Compliance and Planning*
- *Estate and Trust Tax Compliance and Planning*
- *Gift Planning*
- *Succession and Legacy Planning*
- *Tax Authority Representation*
- *Investment Performance Monitoring*

Accounting

- *Business Management*
- *Bookkeeping*
- *General Ledger Maintenance*
- *Back Office Management*
- *Brokerage Accounting*

Entrepreneurial Business

- *Tax Compliance and Planning*
- *Assurance and Attest*
- *M&A Due Diligence and Transactional*
- *M&A Modeling and Analysis*
- *Transactional Structuring*
- *Feasibility Studies*
- *Strategic Planning*
- *Organizational Analysis and Strategies*



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ACCOUNTANTS & ADVISORS