

At WilkinGuttenplan, our dedicated team of experts helps our professional sports clients manage their financial affairs in order to help sustain the lifestyle they desire for many years after their careers have peaked. In today's fast-changing world one never knows when that will be, so careful cooperative planning is extremely important.



Our areas of expertise include tax planning and preparation, budgeting, forecasting, accounts payable and other concierge/family office accounting services. Our professionals are familiar with your needs and well prepared to help you manage your financial affairs both, personally and professionally.

Wealth Management/Tax Planning, Preparation and Compliance

Our wealth management and tax planning process is extensive. We begin by reviewing your anticipated earnings and long-term cash projections. We discuss your financial goals with you and then work with your financial team to implement strategies to increase your wealth while minimizing your tax liability. And since we prepared over 1000 tax returns for athletes, we are familiar with multi-state and international taxation and any applicable deductions.

✓ Our Services:

- Preparation of federal, state and local income tax returns
- Planning & implementation of tax minimization strategies
- State residency planning
- Teaming up with your investment advisors to have a coordinated plan
- Philanthropic planning and execution
- Trust and Estate planning
- Charitable giving strategies
- Concierge/Family Office Services

For athletes, the time spent not working is often spent on family, travel and business-related issues. Our suite of concierge/family office services is designed to significantly reduce stress in our clients' lives while ensuring their financial security.

✓ Concierge/Family Office Services:

- Maintenance of bank accounts
- Bill payment services
- Personal recordkeeping
- Cash flow management
- Create/implement monthly budgets and accounting reports
- Produce forecasted cash flow statements
- Assistance in achieving financial objectives and goals

Our goal is to work as a part of your team of advisors helping to secure your future and give you the peace of mind that only experienced CPAs can accomplish.