



Four Things You Probably Didn't Know You Could Ask Your CPA

You already know that we make it our business to be smart about money matters. You've come to rely on our expertise when you're making decisions that could affect your tax liability. But did you know that we can be helpful in other financial areas, too?

Ask us about your:

INVESTMENTS:

Are your investments allocated to effectively maximize return and minimize tax liability? Is your portfolio being managed in a way that meets both your comfort level and your goals?

If you have any hesitation in answering either of those questions with a resounding "yes," we have some ideas that might benefit you.

INSURANCE:

Do you have enough of the right kinds of coverage? If you're an employer, is your plan providing the right value for what you're paying? And when was the last time you thought about life insurance?

Our quick risk assessment can help you figure out where you're exposed, and we'll give you some solid suggestions for what to do about it.

ESTATE:

When was the last time you thought about your will? How has your asset profile changed since then? Does your estate take advantage of recent tax law changes?

We can help you make sure your estate is structured so that the maximum amount is preserved to be distributed the way you want it to be.

MORTGAGE:

Do you have the most favorable rate available on the market? If you already have a mortgage, does it really make sense to refinance? If you're in the process of looking for one, are you finding the process tedious, frustrating or confusing?

We understand the nuances of both commercial and residential mortgages and can help you identify and get the deal that's best for you.

ADELMAN KATZ & MOND LLP
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Adelman Katz & Mond aims to be our clients' most trusted business advisor. To earn that trust, we work hard to improve on our own expertise, which has been honed over 40 years. And to cover all the bases, we build successful collaborations with other professionals – including attorneys, bankers, investment managers and insurance brokers. We invite you to find out more about the benefits of having us as your most trusted business advisor.

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