

**James E. Rose, CPA**

*Partner*

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Jim Rose, Partner with Baker Tilly Virchow Krause, LLP, has been with the firm since 1978. He provides tax and consulting services to professional businesses including health care providers, architects, and engineers. Mr. Rose also provides tax and financial planning services to high income and high net worth individuals.

**Specific Experience**

- > Advises start-up businesses on the optimal form of business.
- > Assists expanding businesses with financing and capital needs.
- > Works with mature businesses on succession planning and ownership transition.
- > Supports business owners with compensation and fringe benefit planning.
- > Counsels chief financial officers on tax planning and tax compliance matters.
- > Provides individuals with income tax planning and compliance assistance.
- > Directs clients with young families regarding college savings plans.
- > Assists high income clients with tax savings strategies and wealth accumulation.
- > Serves high net worth clients regarding retirement and estate planning matters.

**Industry Involvement**

- > American Institute of Certified Public Accountants
- > Wisconsin Institute of Certified Public Accountants

**Education**

University of Wisconsin - Madison  
Bachelor of Science in Accounting