

Comprehensive services for business owner in transition



Candor. Insight. Results.

A technology company provides workforce management solutions, including time and attendance software, human resources software, and payroll processing solutions that integrate with leading HRIS, payroll, and accounting platforms. It has been delivering innovative timekeeping and workforce management solutions since 1998. Company executives have relied on Baker Tilly for their corporate and individual tax needs.

The need

In working with the client, the tax advisor learned the owner was planning to sell part of his business. The client was going to need help figuring out how best to handle the proceeds immediately after the sale and deciding on the most advantageous investments for his short- and long-term goals.

The Baker Tilly solution

The tax advisor recognized the need to bring in a specialized wealth management advisor and introduced the client to Baker Tilly Investment Advisors.

The owner met with both the tax and investment advisors. Rather than talk about any specific investments during the initial meeting, their conversation explored the client's specific circumstances, key wealth management issues, and potential strategies. The advisors emphasized their ability to work together to ensure all of the client's financial needs would be met and demonstrated a strong focus on the client's unique situation and goals.

The client appreciated Baker Tilly's service approach and saw a lot of value in having his tax and investment advisors working together on his overall financial needs.

Baker Tilly Investment Advisors is a Registered Investment Advisor that offers independent and objective financial advice. The group provides fee-based (not commission) investment consulting to individuals and organizations with the goal of protecting and growing wealth. Clients include businesses, government entities, retirement plan administrators, and high net worth individuals.

We welcome the opportunity to help you meet your business goals.

For success with your investments, connect with us at bakertilly.com/investment-advisors or 800 362 7301.

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