

**William D. Wertz, CPA, MST**

*Partner*

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William Wertz is a Senior Tax Partner and Market Leader with Baker Tilly Virchow Krause, LLP. Bill specializes in a wide range of tax-related planning and compliance services for high net worth individuals and closely-held businesses. As Market Leader, Bill is responsible for fostering and maintaining key relationships within the local business community, as well as identifying and ensuring participation in brand awareness activities.

**Specific experience**

- > Drives local activities in an effort to raise brand awareness and facilitate new business development opportunities.
- > Works with numerous high net worth individuals and owners of closely-held businesses to identify and execute on income and estate tax planning strategies.
- > Speaks throughout the nation to financial professionals on tax and various financial topics.

**Industry involvement**

- > American Institute of Certified Public Accountants, Tax Division
- > Wisconsin Institute of Certified Public Accountants

**Education**

Marquette University  
Bachelor of Business Administration in Accounting

University of Wisconsin - Milwaukee  
Master of Science in Taxation