

PLACK GROUP SERVICES: INDIVIDUAL

We help individuals and business owners thrive; by mastering even the most complex tax scenarios. We are a team of accountants, business coaches, and CPAs that is *all about you.*

● TAX PLANNING

Optimize your tax strategy with our expert guidance. We meticulously track your tax payments, obligations, and opportunities for reduction. Our custom reports provide clear, straightforward insights into your tax situation. Choose from monthly, quarterly, or annual services tailored to your needs.

● FINANCIAL PLANNING

Navigate your financial landscape with confidence. Our ethical and sustainable wealth management strategies are designed as if we were advising our own family. Benefit from regular consultations to keep your finances on track.

● ESTATE PLANNING

Demystify estate planning with our highly trained professionals. We analyze investments, review will options, and evaluate business health to create a comprehensive, easy-to-understand estate plan that secures your legacy.

● TAX GPS+ FOR INDIVIDUALS™

Go beyond basic tax planning with our comprehensive financial strategy service. Regular meetings ensure we understand your full financial picture, allowing us to provide targeted advice and drive your financial growth.

QUICK LINKS

Learn more by clicking the links below:

[Website](#)

[About](#)

[Newsletter](#)

Do you own a business or know someone who does?

Ask us about our comprehensive business services.

*"The Plack Group is outstanding in understanding my needs, being available and getting personally involved."
Client Testimony*

PLACK GROUP SERVICES: BUSINESS

We help individuals and business owners thrive; by mastering even the most complex tax scenarios. We are a team of accountants, business coaches, and CPAs that is *all about you.*

● TRACTION CONSULTING

Accelerate your business growth using principles from "Traction" by Gino Wickman. Our interactive process helps your leadership team boost efficiency and profitability. Choose from quarterly meetings to intensive weekly team sessions with additional one-on-one coaching.

● OUTSOURCED CFO

Gain C-suite expertise without the full-time commitment. Our CFO services include KPI reviews, strategic planning, employee benefits analysis, and cash flow management. Tailored to your organization's unique needs.

● TAX GPS+ FOR BUSINESSES™

Align your business tax strategy with your personal goals. We cover business tax planning, real estate investment, and overall business strategy in regular sessions designed to boost your success.

● SUCCESSION PLANNING

Ensure your business thrives beyond your tenure. Our proactive approach examines current operations, develops transition strategies, and maximizes your benefits. Start early for optimal results and long-term success.

● BUSINESS CONSULTING

Tap into decades of expertise to propel your business forward. Our regular sessions focus on troubleshooting, solution creation, and growth strategies. Customize your consultation schedule to match your business rhythm.

● ONE-LIFE GAME PLAN™

Exclusively for business owners seeking holistic success. We address critical areas including time management, team development, health, sales processes, operations, finances, and accountability to drive immediate and lasting results.

● STRATEGY SESSIONS

Chart your course to success with our experienced consultants. We help you and your leadership team define your current position, set goals, create actionable plans, and build the right team. Choose from monthly, quarterly, or annual sessions to fit your pace.

QUICK LINKS

Learn more by clicking the links below:

[Traction Consulting](#)

[Website](#)

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