

PHOENIX TAX CONSULTANTS

When was the last time you sat down with a planner, looked at your tax and financial efficiency and had a resource to identify areas for improvement and help you set up a plan for better results and future goals? It can be isolating trying to do this on your own.

Business owners, do you know your margins and ratios? Do you have any vulnerabilities that could cause you to run off the road?

Fact: most businesses fail three years after their best year.

Your business may be your biggest asset — are you viewing it like this?

Do you have a plan for employee retention? It is costly to lose an employee.

A well-designed retirement plan may be your best defense to reduce your taxes and may not be as expensive as you think.

Have you offered your team concierge tax preparation with pick up, delivery, group discounts and virtual options — we can do this for you!

At Phoenix Tax Consultants LLC, the mantra is “we don’t just process, we plan.” Owner Julia Brufke Wenger and her award-winning staff fully embody the belief that it is impossible to be a good tax preparer without taking into account holistic strategic planning, and a good financial planner or advisor must understand and factor in taxes. This multidimensional approach to tax preparation and tax and financial planning has made PTC a trusted resource and one stop shop for individuals and small businesses.

PTC, a **Certified Women Owned Business**, is a full-service, year-round tax firm serving over 1800 individual, small business, and corporate clients. The staff of CPAs and Enrolled Agents are experts in federal, state, and local taxes and have experience with international, executive, and other specialty tax needs so they are ready to help you with your tax preparation no matter how simple or complex. Taxes and finances are ever changing, so as an alumna of the Goldman Sachs 10,000 Small Businesses program, Julia embraces the idea of continuing education. The pedigrees of the PTC staff include multiple degrees from University of Pennsylvania, West Chester University, and Villanova, as well as Master in Taxation degrees from Drexel University and Boston University, and a law degree from Tulane University.

PTC has been a member of the Phoenixville and Philadelphia metropolitan area business communities since 1990, when Phoenixville was not yet a suburb and no longer a steel town, a time when places like Fazzini’s shoes and Whitey’s Variety Store still doing business on Bridge Street. Starting in a single store front, PTC now occupies the entire corner of Bridge and Gay Streets in downtown Phoenixville; understanding our community and witnessing firsthand the growth of the Rt 422 corridor.

As a small business owner, Julia understands the twists and turns of a growing business and is there to offer firsthand knowledge. PTC is a main street firm with national firm services. The firm was recently listed twelfth on the 2019 Philadelphia100®. Cofounded by *The*



JULIA BRUFKE WENGER

Philadelphia Inquirer and the Entrepreneurs’ Forum of Greater Philadelphia, the Philadelphia100® awards identifies and honors the 100 fastest growing, privately held entrepreneurial companies in the Greater Philadelphia Region. Do it yourself tax software can be lacking, and a brick and mortar meeting can be an inconvenience, so PTC offers **virtual tax preparation**. With the use of secure protocols, they can transmit documents, use e-signatures, and conference with you face to face using various technologies. Currently clients as far away as Thailand make use of PTC’s services.

Julia has a vision for her business and she and her team are dedicated first and foremost to their clients. She is a **Certified Financial Planner®, Chartered Financial Consultant®, IRS Enrolled Agent**, and holds a Bachelor of

Accounting from Villanova University and Master of Science in Financial Services degree from The American College of Financial Services. She started Phoenix Tax Consultants with the goal of providing in-depth tax planning and strategy in addition to general accounting and tax services throughout the Philadelphia region. She is a published subject matter expert for the Wall Street Journal, Journal of Financial Planning, Advisor Today, SmartCEO Magazine, Main Line Today, and numerous local publications. She is also an accomplished speaker having presented multiple times at national conferences for the financial services industry.

Visit the Phoenix Tax Consultants website at www.taxtacklers.com or call the office at 610.933.3507 and learn how PTC can make a difference for you.



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The Award Winning Staff



Mayor Peter Urscheler



CFP® & WBENC Certifications