

VIRGINIA FINANCIAL

Navigating Clients to Financial Success

Comprised of associates who are both practicing CPAs and financial planners, CPA Investment Advisors LLC (CPA-IA) is uniquely equipped to steer clients through just about any financial decision.

Tazewell “Taze” Taylor and Jerry Sullivan became registered investment advisors and launched CPA-IA in 2000 as a complement to their now 30-year-old accounting firm. “Having listened to our clients’ concerns for many years, we knew exactly what they were looking for,” says Taylor.

Their CPA Personal Financial Specialist (CPA/PFSSM) credential is awarded through the American Institute of CPAs[®] to CPAs who possess extensive tax expertise as well as a comprehensive knowledge of financial planning, including estate planning, retirement, investments, and insurance.

“The average investment advisor doesn’t have such comprehensive training over such a wide area,” says Taylor.

The business, often described as a “boutique firm on steroids,” also includes Cheri Poston, a Certified Financial Planner[™] professional, and Christi Campbell, who handles administrative matters.

Trusted Advisors

Over the years, CPA-IA has grown quietly through word of mouth and reputation. Many of the firm’s clients are high net worth individuals that had been CPA firm clients for a number of years.

“There’s a certain stage where it makes sense for a CPA firm client to dovetail into the financial services side,” says Taylor. This is especially true for those successful clients who have accumulated assets during their careers or are

transitioning into retirement, possibly having sold their businesses.

The partners approach investing with the measured caution expected from CPAs. “Our clients know that we are conservative by nature, and they appreciate that we don’t take undue risk,” says Taylor. Portfolio models are kept relatively simple and straightforward, but the firm is not afraid to get outside of the box in order to enhance performance.

Clients of the firm can expect clear communication and ongoing education about the advisors’ strategy. When working with a new client, the advisors craft an investment policy statement that details the client’s expectations. It’s signed and reviewed annually to make sure expectations are being met.

“We want clients to grasp what we’re doing and why,” says Taylor. This helps tremendously during volatile periods in the market and helps keep anxiety to a minimum. The phone rarely rings at CPA-IA during those volatile stretches because clients are kept informed and understand the longer-term strategies.

“It all boils down to trust,” says Taylor. “It’s about making sure the firm does everything possible to continue to earn the trust clients have given us. Whether it’s regarding client-managed portfolios or broader financial planning services, there’s nothing more important.”

Tazewell “Taze” Taylor, CPA/PFS, and Jerry Sullivan, CPA/PFS



CPA-IA is located at 5544 Greenwich Rd., Suite 103, in Virginia Beach, VA. For more information, call 757-497-4425 or visit cpa-ia.com.