Gulf Island Accounting & Tax™

Your Finances Deserve Great Services

Bartly E. Zautcke CPA, CMA, CGMA, CFM, MAcc.
P.O. Box 767
Sanibel, Florida 33957
(239) 233-3442
Bart@GulfIslandCPA.com
www.GulfIslandCPA.com

Personal Financial Services

Personal financial services help clients take care of the financial complexities, responsibilities, and decisions they can face every day, once a month, once a year, or once a lifetime. Working with us you can have confidence that all services are delivered in an honest, personal, and professional manner.

Value Created - By Helping You Make The Right Choices

Personal financial services add value by helping you make the right choices. Whether it is reducing taxes, maximizing your savings, planning for the future, or optimizing benefit choices; we can help you navigate both the forest and the trees. All our local personal financial services customers receive free "House Call/Concierge" service – We come to you and don't charge for travel, and we give out direct cell phone numbers so your calls go straight to the person you are trying to reach.

Personal Financial Services - What We Do To Address Your Needs

Personal financial services we provide include:

- Personal Tax Return Preparation
  - IRS Response & Representation
  - Identification of Tax Reduction Strategies
  - Domestic Employee Compliance
  - Family Employment Matters
- Personal Financial Planning
  - Ongoing Every-Day Financial Advice / Q&A / Decision Support
  - Assistance With Daily Money Matters for You or Someone Needing a Little Extra Assistance
    - Fraud / Identity Theft Prevention Programs
    - Bookkeeping & Bill Paying
    - Basic Estate Planning
    - Final Return Income Tax Planning
  - Family Budget Audit – Specific everyday ways to save money, make more money, and reduce or defer taxes
  - Long-Term - Big Picture Plans
    - Alternatives, Opportunities & Concerns
    - Investment Advisor Selection & Support
    - Assistance With Government Benefit Programs
    - Tax Implications for Each Account
  - Assistance With Downsizing
  - Retirement Options / Paperwork
  - Assistance With Relocation
  - Personal Business Transitions – Sale, Retirement, Liquidation
- Personal Financial Statement Preparation
- Notary Services

Why Hire Us?

We bring you: Extensive experience, value, and insights. Work with a high quality local firm committed to providing exceptional client service. **Call us at (239) 233-3442 to get started today.**