

Tax Planning

At WRP, we believe that the best financial advice encompasses all of the core aspects of wealth management. With expertise in financial planning, investment, stock options, and tax planning, WRP offers a distinctive suite of services that sets us apart from other financial and tax firms.



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Tax Planning

WRP works with our partners at WRP Tax to help you mitigate the tax burden that comes with wealth accumulation. WRP Tax provides income tax projections and preparation as well as audit representation for individuals and businesses alike.

WRP specializes in helping executives and employees in pre-IPO companies navigate the IPO process. We'll use tax-efficient investment strategies in concert with tax projection and planning to protect your wealth and help it grow. We can assist with strategies such as

- Determining alternative minimum tax (AMT) applicability
- Making timely 83(b) elections
- Active tax loss harvesting
- Charitable giving
- Accelerated gifting
- Advanced estate planning
- Tax projections to inform financial decisions
- Year-end tax planning

Why Work With WRP

We Have the Expertise to Protect Your Financial Future

Most firms can help you with either tax or financial planning. WRP employs expertise in both fields to bring you the very best in financial management service, guiding sound investment choices with a sharp eye on the tax implications that come with them. Specializing in financial planning for professionals in pre-IPO companies, we can help you save money by guiding you through the complex financial issues that come with receiving company stock options and your company's IPO. With a personalized approach to financial management, WRP will design a unique plan based on your goals and risk tolerance and then fuel its success with evidence-based investment strategies.