

REITZ & COMPANY

CERTIFIED PUBLIC ACCOUNTANTS

At Reitz & Company we are your Retainer Financial Advisor (RFA). Now you ask what a RFA is and what an RFA does? In the business industry, a “Retained” professional is one who is on-call, via telephone and or email, to answer/guide/advise you in regards to any questions or problems that may arise in your daily life.

At Reitz & Company we are available to you to answer/guide/advise you in all business and financial questions and problems that you may encounter during the year. This service is offered at no additional charge to all of our clients. We like to say that we are your “financial doctor”, available to you to cure any financial or tax related diseases or issues.

As we all know there are many types of financial advisors available for you to utilize, from stockbrokers to insurance salesmen to attorneys. Why would you call us versus one of the other advisors? Quite simply, we know more about your pertinent financial information (taxes) and we are unbiased in our opinion since the only person we want to win the financial race is ‘you’, our client.

Taxes are the largest annual cost (30% to 50%) an individual or family will pay each year. In addition, taxes are the largest variable (unknown) in all business decisions. Therefore, why wouldn’t you want to retain someone who knows your tax situation?

With decades of experience in preparing taxes, financial statements, and dealing with the taxing agencies (IRS, FTB, EDD, Board of Equalization), we have a much better understanding of how to answer/guide/advise you when you have to make the right financial decision. We work directly with you to make the right choice(s).

Below is a sampling of questions/problems/decisions which we assist our clients with on a frequent basis:

- How do I pay less in taxes?
- What tax shelters are best for me?
- What mix of investments (stocks/bonds/real estate/gold/money market) is best at my age?
- Do I need a living trust?
- How much is my business worth? Should I keep it or sell it?
- Do I have the proper insurance coverage; or am I overinsured or underinsured?
- How do I hold title to my assets?
- Could I save ‘death taxes’ in the future by ‘gifting’ my money away now?
- Should I incorporate my business? What type of entity should I become?
- How do I track my business income and expenses? How do I make specific accounting journal entries in QuickBooks?
- Divorce issues (see our sister company Reitz & Morton www.reitzmorton.com);
- Should I refinance my house?
- Estate questions and problems;
- And more.

At Reitz & Company we will answer your questions and if needed direct you to the proper professional to effectively and efficiently handle and resolve the problem in the most cost friendly manner. Any work performed by our office (calculations, projections, letters, meetings) will be billed at our prevailing rates with an estimation of our fees before work begins.

It is a win-win situation when we give you the right answer at the right price so that your financial security and path will be the most successful- beyond what other professionals would deliver.

Add it up: Overpaying an attorney \$400+, making a bad investment, maintaining a high interest rate on your house, not taking all of the tax deductions you are entitled to (or not taking the proper ones) will cost you hundreds of thousands of dollars over your lifetime. At Reitz & Company we make ourselves available to answer your questions and address your concerns before you harm your financial health. We have saved, and continue to save, our clients thousands if not hundreds of thousands of dollars in extra fees, income taxes, mortgage interest rates, bankruptcy decisions, real estate foreclosure guidance, divorce issues, and much more.

By allowing Reitz & Company to provide the above added value, you have taken the first step in insuring your secure financial future.