

Jacob Peters Video Bio

The way I really like to work with clients is to deliver no surprises. And what I mean by that is, when I deliver their tax return, they already know what's in it. They know what's there because we've been talking about it throughout the year with our tax planning or at year end, and by the time they get their tax return, they know what's going to be in it just like we know what was in last week's newspaper. By the time we deliver that return, we're already talking about the next year and again, there's no surprises that come with that.

My clients tell me that I bring a different approach to what they expect from their CPA. And I think that's because I take an interest in their lives outside of just the numbers or the tax returns, you know. I like to learn how do these numbers help them do what they like to do in their personal lives, their family, what their goals are. And I think that just really brings a good note with clients as I get to know them and work with them.

My favorite part about the work I do is helping people whether it's dealing with their taxes or their finances or a plan for their future. We set it up, we help them make decisions with information that they may not be able to get without our guidance and then we help them get there.