

EXPERT GUIDE CERTIFIED PUBLIC ACCOUNTANT

CPA's are a lot more than bean-counters

Jeffrey Whittaker, CPA, doesn't want to be the type of tax professional that clients only turn to once a year at tax time. The ten-year resident of Flower Mound has much more to offer than that and he wants to be a part of an ongoing collaboration with his clients that will allow them to pay the least amount of tax they legally owe and to reach the level of success they want to reach. "People often think of CPA's as strictly bean counters," Jeff said, "but I pride myself on being more than that. I want to help clients think ahead, not just worry about last years results. That is why I was determined to include financial planning services in my practice." Mr. Whittaker said he wants to think about where clients will be in six months time, in a year's time, and even further, while he plans with them the best business and tax strategies

for their personal goals. July may sound like it is very early in the year to start planning taxes, but the CPA said that is when he likes to meet with clients to refresh the tax strategy plan for each client. That is just a part of what Jeff does each year to help clients look forward and not wait until the last minute to deal with taxes.

Jeff and his wife Debbie have been married for 28 years and they met while students at The University of South Florida in Tampa. Growing up in Pennsylvania, Jeff said he did not enjoy the cold weather and gravitated toward a warmer climate as soon as he could. After graduation, he went into the real estate and construction industry before joining a telephone company in Florida that eventually merged to become Verizon. As Jeff rose up the ranks, he and Debbie re-located to Texas in 1989, about the

same time he passed the Certified Financial Planner Exam. It wasn't long before Whittaker had also passed the Certified Public Accountant Exam as well.

In 2005, Mr. Whittaker was asked to re-locate to New Jersey, and that is when he decided to stay in Flower Mound and open his own CPA firm. Several of his personality traits have served him well in this endeavor, such as his talent for public speaking and also his "people skills" that allow him to work successfully with people from all walks of life.

He has become very involved



JEFFREY WHITTAKER

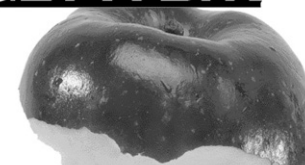
in the community here and volunteers with numerous organizations such as the Flower Mound Chamber of Commerce. He serves as treasurer of the Lewisville Education Foundation as well as the

Flower Mound Friends of the Library, and Mr. Whittaker also serves on the Board of Governors for the Texas Health Resources Presbyterian Hospital of Flower Mound. Until recently, he was also on the Town of Flower Mound Community Development Corporation, where he served as Treasurer, before he left to accept a seat

on the Flower Mound Planning and Zoning Commission. Mr. Whittaker's clients will not have a hard time reaching him, as he answers his own phone and returns messages within 24 hours. "I believe in a very strong commitment to customer service, and my clients know they will be able to get a hold of me when they need to," he added.

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