

Partner Insights with WB

Weltman Bernfield will be presenting discussion sessions each month on topics of interest to help you in your business and personal life; such as:

- Income and Estate Tax Planning
- Healthcare Management
- Retirement Planning
- Business Succession Planning
- Business Valuation Process and Strategies
- Sarbanes-Oxley (Sox) Implementation and Compliance
- Alternative Investment Strategies
- Starting a Business
- Personal Investment and Credit Strategies
- Facts About Your Next IRS Audit
- Business Fraud Detection and Prevention
- Equity Funding Strategies



Weltman Bernfield LLC
Certified Public Accountants and
Business Consultants

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