

the only thing more difficult  
than **accumulating wealth**  
is knowing what to do with it



**W**hen the owner of a private communications service firm decided to sell his business, he called on Weiser to analyze the tax implications of the sale and to help narrow down his choices of how to structure the sale. Weiser's professionals were with him every step of the way, presenting tax projections that maximized the efficiency of his various choices. We also provided guidance in understanding the long-term implications of his decisions. The client's liquid net-worth increased by almost ten times as a result of the sale, and Weiser's strategies helped ensure that the client retained most of that wealth for future growth.

Weiser's involvement did not end there. The client soon realized that, even with millions of dollars of investable assets, he wasn't getting the level of service that he expected and required from the large brokerage houses, so he again turned to Weiser. Our professionals developed a customized financial plan to meet his needs and goals, including gift and estate planning, college funding for his children, and continued tax planning. With a trust and a family partnership now in place, the client is on his way to making his goals a reality.