Candice Gerlach

Certified Public Accountant

Carlsbad CPA Offers Accounting, Bookkeeping, and Tax Preparation Services

May 06, 2020

May 06, 2020 - PRESSADVANTAGE -

Candice Gerlach, a Carlsbad CPA and the founder and CEO of Candice Gerlach, CPA, Inc. in Carlsbad, California, has announced that they are offering accounting, bookkeeping support, and tax preparation services. They want to point out that they are dedicated to their clients and do their best to understand their clients? needs. They make use of a proactive approach to tax planning and remain in contact with the client throughout the year. They are well informed on emerging issues and ensure that they are up-to-date regarding tax laws to ensure that they are always ready for the toughest conditions.

Candice Gerlach herself says, ?We developed strategies for both business and individual clients. And we work hard and long hours when they need us - even after tax season. So let us tackle your most pressing financial issues, and make sure you understand what your financials are telling you about the health of your business.?

Candice Gerlach, CPA, CFE, has almost 20 years of experience in public accounting. She has obtained certification as Certified Fraud Examiner and Certified Public Accountant in Carlsbad, California. She has a Master of Business Administration (MBA) degree and a BS in Accountancy degree. She is an active member of the Association of Certified Fraud Examiners and the American Institute of Certified Public Accountants.

Throughout her career, she has focused on financial statement preparation, white collar crime, and audits and tax compliance. She had served has the lead forensic accountant is many huge national financial crimes, including a Ponzi scheme worth $100 million. She has also been involved in recovering assets for the Federal Receiver to return to victims, tracing laundered money in various parts of the world, and offering supporting documentation for several lawyers and law enforcement agencies.

At the present time, she is focused on tax compliance issues in a wide range of areas, including individuals, partnerships, estates and trust, including closely held C and S corporations. She has a broad range of clients, ranging from young entrepreneurs to high net worth individuals. She has also helped with not for profit tax compliance and governance. She moved from Scottsdale, Arizona, to Carlsbad, California, in 2013. She has also worked in the diamond industry where she became a Certified Diamontologist through the Diamond Council of America.

The CPA firm can help clients with various accounting and financial tasks. These include income tax planning, estate planning, investment strategies, charitable giving, retirement planning, cash flow planning, risk management, education funding, and elder planning.

They can assist with tax reduction strategies that optimize the client?s retirement plan contributions, making charitable contributions, and tax loss harvesting in portfolios. In estate planning, it may help to take a look at a flowchart of the client?s current estate plan to visualize what will happen to each of their client?s assets and how the estate tax law will affect them. It is important to ensure that all estate planning documents are up to date, not just the will, but also the health care documents, power of attorney, and any trust agreements. It is also make sure that the beneficiary designations are up to date if there has been a significant life event, such as marriage, divorce, or death of spouse.

The CPA firm can also help with the client?s investment strategies, particularly when there is increased market volatility. Regular portfolio rebalancing will allow clients the maintain the proper amount of risk in their portfolio. And for those who are retired and living off their portfolio, they will need to maintain a certain amount of cash reserve to cover their living expenses for a certain period of time so that they will not be forced to sell equities in a down market.

They can also help clients achieve tax efficiency when making charitable gifts. For instance, people can donate appreciated stock to be able to avoid paying for capital gains taxes. It may also be a good idea to bunch charitable deductions.

Those who are looking for help with their tax preparation or accounting tasks may want to check out the Candice Gerlach, CPA, Inc. website, or contact them on the telephone, or through email.

###

For more information about Candice Gerlach, CPA, contact the company here:Candice Gerlach, CPACandice Gerlach(760) 444-1140info@candicegerlachcpa.com

Candice Gerlach, CPA

Candice is the founder and CEO of Candice Gerlach, CPA, Inc. She is a Certified Public Accountant and Certified Fraud Examiner in Carlsbad, California.

Website: https://candicegerlachcpa.com/

Email: info@candicegerlachcpa.com

Phone: (760) 444-1140