



The CPA Advantage Series Video #9 | Trust Is Critical | Video Transcript

Andy Bertke, CPA & PFS | Director

Beth Germann, CPA & PFS | Tax Manager

Beth Germann:

As your CPA, we know that our relationship and the trust is very important. You share almost all your information about your financial wellbeing with us, and by being able to have that relationship, we can really have an opportunity to advise you best.

Through sharing your financial documents with your tax filings, we can look at and evaluate where you're headed in your retirement planning and your financial goals. And that trust is really important, whether it's in our fees or how we advise you on future transactions.

Andy, do you think you could tell me a little bit about how our investment philosophy goes into how you would choose to invest?

Andy Bertke:

One of the things we haven't talked about yet was under our investment philosophy, we picked the stocks that go into your portfolio. One of the things that makes us different, Beth, is that we build the portfolios for our clients out of individual stocks, we don't put their money into mutual funds to let somebody else manage it, and that's critical.

And the other part that we haven't touched on yet, it is if I'm in a growth portfolio with our Barnes Dennig Wealth Management, if I'm in a growth portfolio, and one of my clients is in that growth portfolio, well guess what?

We're in the exact same stocks, I don't have anything different than they have. I mean, so when you think of it, the old cliche, we eat what we cook. If we're willing to put our clients in there, well, by golly, we're going to be in there also.