

OPPORTUNITY FOR GRADUATE

Montgomery Taylor & Company is looking to expand the way we offer our wealth management services. Right now we refer out all of our client's legal work. We are thinking we would do a better job for our clients if we maintained a closer in-house legal connection. Perhaps we could have a jointly owned "Estate and Elder Care Center", or maybe it would be an arrangement where an attorney maintains an office within our offices (part-time or full-time) and collects their own fees for the work they do.

We are a growing firm, offering tax planning, tax preparation, investment management (fee-only), retirement planning and college planning. We see the opportunity to further expand our in-house offering to serve our growing baby-boomer clientele. These services are necessary, even in our current bad economy, so we're building our team.

If you are interested in this opportunity, please direct your inquiries and send a resume to:

Montgomery Taylor, CPA, CFP
2635 Cleveland Avenue, Suite 5
Santa Rosa, CA 95403

Thank you,

Barbara Shaw