

BKM Wealth Management Welcomes Matthew Kabitzke, CPA, as Director of Tax Planning

BROOKFIELD, WI, January 9, 2025 - BKM Wealth Management, a registered investment adviser (RIA), is pleased to announce the addition of Matthew Kabitzke, CPA, to its team as the new Director of Tax Planning.

With over two decades of experience, Kabitzke will lead the firm's tax planning initiatives, focusing on client tax strategies, income tax preparation, and filing. This strategic hire aligns with BKM Wealth Management's mission to positively impact their clients' lives by providing comprehensive financial advice and simplifying the tax process.

"We are thrilled to have Matthew Kabitzke join our team," said Casey Berrall, Co-Founder of BKM Wealth Management. "His deep expertise in tax strategy will greatly enhance our ability to provide customized solutions that reduce tax liabilities and optimize our clients' financial outcomes. Matthew's addition allows us to offer a more holistic approach, integrating financial planning, investment management, and tax services seamlessly."

Kabitzke shared his enthusiasm about his new role: "Joining BKM Wealth Management is an exciting opportunity to combine my passion for tax planning with the firm's outstanding services. We aim to deliver a clearer financial path for our clients, enhancing their after-tax wealth and ensuring a more coordinated approach to their financial plan."

This strategic enhancement of services reaffirms BKM Wealth Management's commitment to providing personalized, fiduciary-level care to families and business owners. Clients can look forward to a more integrated tax planning experience that complements their broader financial strategies.

For more information, visit www.bkmwm.com.

About BKM Wealth Management:

BKM Wealth Management is a fee-only RIA managing over \$580 million in assets under management. The firm specializes in financial planning, investment management, tax services, and retirement plan consulting, all aimed at delivering exceptional client service and outcomes.

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