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Whether preparing a tax return or building a comprehensive financial strategy, Julia Brufke Wenger and her team at **Phoenix Tax Consultants LLC** and **Bala Financial Group Inc.** provide personalized guidance grounded in expertise, collaboration, and long-term relationships.
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Julia Brufke Wenger

Beyond the Numbers

BY MATT COSENTINO
PHOTO BY JODY ROBINSON

WHETHER PREPARING A TAX RETURN OR BUILDING A COMPREHENSIVE FINANCIAL STRATEGY, JULIA BRUFKE WENGER AND HER TEAM AT **PHOENIX TAX CONSULTANTS LLC** AND **BALA FINANCIAL GROUP INC.** PROVIDE PERSONALIZED GUIDANCE GROUNDED IN EXPERTISE, COLLABORATION, AND LONG-TERM RELATIONSHIPS.

As A TAX SPECIALIST AND CERTIFIED FINANCIAL PLANNER® PROFESSIONAL with nearly four decades of experience, Julia Brufke Wenger has built her practice around one primary goal: providing clarity for clients. Every advisor on her team—including Wenger herself—is a CERTIFIED FINANCIAL PLANNER® professional who takes a comprehensive approach to planning, helping clients connect the many moving parts of their financial lives.

“We believe financial planning works best when every piece is connected,” Wenger says. “Taxes, investments, retirement income, estate planning, and life transitions all affect one another, and our role is to help clients understand how those pieces fit together.”

That comprehensive guidance is especially important as clients approach retirement. Wenger says many people have done an excellent job saving money over the years

but remain uncertain about how those assets will realistically translate into sustainable lifetime income.

“People often come in asking, ‘Can I really retire? Will my money last?’” Wenger says. “One of the most rewarding parts of what we do is seeing the relief clients experience when we can show them exactly how retirement income will happen. We really shine in that space because we help bring clarity and confidence to a process that can otherwise feel overwhelming.”

That philosophy also shapes the culture at both firms, where collaboration and personal relationships are central to the client experience. A mother of four and grandmother of two, Wenger sees parallels between leading a family and leading a team.

“Having a team isn’t much different than having a family: You look at the talents, align them properly, and figure out what everyone needs,” says Wenger, an area native and graduate of Villanova University. “Working with people who are trying to get their kids through college, who have lost a parent, or who are going through a divorce requires more than technical knowledge. It requires understanding.”

That balance of technical expertise and personal connection becomes especially important during major life events. Last year, when longtime clients were coping with the husband’s stroke, Wenger and her staff helped ensure their financial concerns were managed so the family could focus on recovery.

“The only thing the wife had to worry about was taking care of her husband,”

Wenger says. “We already knew what would happen with the income, what would happen with the cash flow, and where the emergency money would come from. In times like that, having a trusted planning team behind you is invaluable.”

Wenger encourages clients to take an active role in the planning process and recommends that both spouses participate in meetings whenever possible. Many clients utilize both the tax preparation and financial planning services offered by the firms, allowing for year-round coordination and proactive guidance.

Every client receives a complimentary follow-up meeting after tax season beginning May 1.

“We pull up their tax return and see if we can get a better result for them in the future, and we also ask about changes happening in the current year,” Wenger explains. “If clients communicate with us ahead of time, we can often help them avoid surprises or create strategies to offset potential issues.”

Those conversations frequently extend into legacy and charitable planning. As a Chartered Advisor in Philanthropy® (CAP®), Wenger works with many high-net-worth individuals and families to help structure charitable giving strategies and determine how they want their wealth to impact future generations and the causes they care about most.

“We have wonderful wealth management capabilities,” she says, “but the recommendations and outcomes are unique to every client because every client’s goals and values are different.”

Both firms continue to embrace evolving technology to enhance efficiency and client service. From digital recordkeeping and remote meetings to artificial intelligence tools that assist with detailed meeting documentation, Wenger believes innovation allows the team to spend more time focused on relationships and planning.

“Our goal is to stay on the cutting edge with the tools available to make clients’ lives easier,” Wenger says. “The more efficient we are operationally, the more time we can dedicate to maintaining strong relationships with the people we serve.” ■

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