

September 29, 2021



**CAUSEY
STREETER**
CERTIFIED PUBLIC
ACCOUNTANTS

Dear Valued Client,

The entrepreneur Richard Branson is quoted as saying “every success story is a tale of constant adaption, revision, and change.” And so, it is in this spirit of optimism, growth, and excitement that we announce the merger of our two firms –

Private Client Tax Solutions, LLC and Wendell Causey, CPA, PC – into ***Causey Streeter, CPAs*** on ***Wednesday, September 29.***

Over the past year, we have worked diligently to ensure that this merger will result in key benefits to all our clients, and we are thrilled to share some of these details with you now.

A bit about Wendell Causey: Wendell has over 43 years of professional experience in tax, accounting, auditing, and consulting for families as well as businesses. Wendell has assisted with tax and audit for some of the world’s largest “big eight CPAs” but also enjoys crafting customized accounting solutions for his personal clients. In addition to traditional tax services, Wendell offers bookkeeping support, part-time CFO services and tax resolution assistance for IRS matters.

Wendell’s team includes Senior Manager Christine ***herself a CPA***, Senior Accountant Stephen, and Senior Administrative Assistant Christy, all of whom will continue to be part of the new Causey Streeter, CPAs practice.

A bit about Justin Streeter: Justin Streeter is a Certified Public Account with 24 years of professional accounting expertise with both businesses and families. In addition to being a tax professional, Justin owns and operates a successful Private Wealth Advisory practice with Ameriprise Financial, offering financial planning, insurance, and investment management. Justin’s deep bench of knowledge can help all his clients, regardless of need or life stage and he enjoys being their “go to” financial quarterback. This is because Justin not only understands the investment world, but also the tax ramifications that come along with it. He is always thinking about the **tax alpha** and how it will impact your goals. Justin is grounded by his deep faith and believes that one of the greatest gifts you can give to the world is helping people live up to their potential.

Justin’s team includes his wife Leigh, who serves as operations manager for his Private Client Tax Solutions practice, as well as Amber, and Heather who focus their attention on his financial planning practice – ***KeepWatch Financial.***

In addition to merging our two practices, we will also be merging office locations. Our new, combined office will be moving to the Alpharetta area in late April 2022 and will be a central location for all your tax and financial planning needs. We look forward to announcing our new address soon and then welcoming you into our new home following the 2022 Spring tax season.

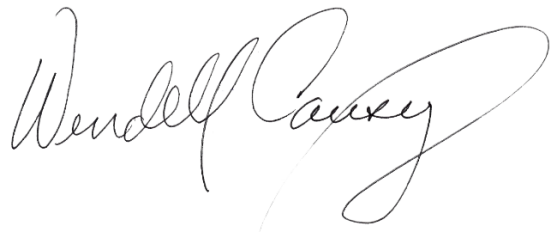
As always, we are resolved to providing a high level of customer service and stand ready to help you at any time. Our goal is to ensure that you feel confident in your financial future through our in-depth analytics and focused, forward-thinking tax planning. If you have any questions, please don't hesitate to call us at (678) 831-4539 (for Justin) or at (470) 309-2741 (for Wendell). Thank you in advance for the continued confidence you place in us and for the opportunity to serve you and your family.

Sincerely,

Handwritten signature of Justin D. Streeter in black ink.

Justin D. Streeter, CPA, CTS
Certified Public Accountant
Certified Tax Strategist™

6000 Lake Forrest Dr, Ste 107
Atlanta, GA 30328
678.831.4539

Handwritten signature of Wendell Causey in black ink.

Wendell Causey, CPA
Certified Public Accountant

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