

Cornerstone Wealth Revolutionizes How Contractors and Their Family Businesses Are Served by Financial Services Industry

Privately-owned financial services firm serving the Greater Boston area helps construction entrepreneurs understand their taxes and increase their wealth

BEVERLY, MASSACHUSETTS, U.S., July 26, 2021 /EINPresswire.com/ -- [Cornerstone Wealth Consulting Services, LLC](#) ("Cornerstone Wealth") is reinventing the tax consulting business for high-achieving contractors. Founded in December 2020 by Jason Berube, Cornerstone Wealth is an independent and privately-owned business in Beverly, Massachusetts. The company works with individuals, families, corporate executives, small businesses and family-owned businesses in the construction industry to help organize, inform and provide guidance on their financial opportunities and challenges.

"Coming from a long line of family-owned construction company owners, I started my firm to help those with similar backgrounds better understand and build their wealth to benefit generations to come," said Jason P. Berube, Founder & CEO, Cornerstone Wealth Consulting Services. "We take a comprehensive planning approach to create a financial strategy that works for each client and devise a tailored plan that aims to take care of their families, businesses and legacies."

Cornerstone Wealth offers a signature service called The Builders Tax Reduction Program. The company's unique tax efficiency and planning program was created to assist tax filers proactively save money by tailoring their taxes to current and future financial needs. Cornerstone Wealth's team of professionals helps clients avoid getting hit with an expensive tax bill, which is especially useful for busy small business owners and entrepreneurs who rarely have the time or resources to keep up on taxes themselves.



Jason Berube, Founder of Cornerstone Wealth Consulting Services, LLC

A Cornerstone Wealth consultant can work directly with an individual's or business' accountant to review their taxes and identify opportunities for savings on future taxes by offering proactive ideas about what they could do differently now. This individualized tax plan also includes analyzing current income and potential future liabilities.

By taking a value-based approach to wealth management, Cornerstone Wealth Consulting Services assists clients with their beliefs and goals. This stems from the philosophy that financial decisions are made at three levels, including: transactional (the price of products), process-focused (consists of tax laws and models for maximizing efficiency in investments) and core values (core beliefs that serve as compasses for behaviors).

In addition to tax efficiency planning and personal planning, Cornerstone Wealth offers generational planning services, which determines how assets will be passed down through generations so they may grow over time more efficiently than if left untouched. Another service they offer is business planning, which assesses a client's risk tolerance for choosing an investment vehicle (stocks vs. bonds).

For more information, visit www.cornerstonewealthllc.com. To book a call with Jason, visit calendly.com/cornerstonewealthsvcs or call directly at 978-304-9467.

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