

# Heath Walters of The Walters Institute to be Featured on Close Up Radio

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[/EINPresswire.com/](https://EINPresswire.com/) -- On our life's journey, we all need to make the best financial decisions we can for handling our money. When it's time to file our taxes, we seek out CPAs to prepare our tax forms by the filing deadline and hope to pay as little to the IRS as legally possible. But what about other financial decisions like cash flows, retirement, investments, estate planning, insurance, and savings? The key to an abundant financial future is extremely stressful with so many different financial professionals we need to see in order to keep our finances in check. What if there was a way, we can have all the key people that give financial security to a client sitting at the same table and working together to create a holistic plan at no additional cost?



Heath Walters is the founder of The Walters Institute, a group of professional highly sought-after tax planners taking accounting to a whole new level of financial services.

"There is an obvious disconnect between financial planning, tax planning, and value for clients in America. Most financial advisors have a disclosure on their website stating 'We don't or are not allowed to give tax advice however 90 percent of clients are expecting or anticipating their financial advisors to give them tax planning advice and resolve their tax problems. So, we have built this firm to deliver a non-traditional approach and offer long-term value year-round to teach them smarter ways of handling their finances so they don't constantly have to stress over their money and simply leave it to us to do the work efficiently and effectively."

Heath, a CPA by trade, says from a technical perspective he helps clients with enormous tax

problems mitigate that tax burden by significantly reducing their taxes. From a business perspective what makes him so unique is he does not market directly to clients rather he provides tax planning skills to financial advisors so they can deliver those results to their clients. This came directly from realizing that 90 percent of clients “expect” their financial advisors to give them tax planning advice, but 80 percent don’t have the tools or resources to provide that to their clients.

Heath says most of us at some point in time, will unequivocally need three of the following professionals to ensure our future financial success: a Tax planner, a Financial advisor, and an Estate planner. Generally, these professionals are in different locations and do not confer with one another about our financial circumstances and future.

“The Walters Institute was created to provide all these resources under one roof. Since most of us are in fact overpaying on our taxes, we must find the most optimal ways to acquire these professionals to be on the same page. That’s why I integrated all those skill sets resulting in amplifying return because you are able to lower your tax bill and have more money to invest. It’s a business model that works for all parties.”

Heath, and his talented team of experts, take a proactive approach to accounting, bringing ideas, value, knowledge, expertise, and experience. Their objective is to ensure their client’s long-term success by providing them with financial clarity, increasing profits, and enhancing their futures. As the most highly skilled tax planners, they can get them the most for their tax deductions and keep their financial documents systemized while planning ahead for a bright financial future.

“Money should have a purpose for every family, and we all need to define that purpose. Regardless of how we choose to spend our money is completely our prerogative. No matter what path we choose to take we need to plan our purpose for our money and make wise decisions.”

Not everyone knows what tax planning is, Heath, points out, but it means almost the exact same thing as financial planning: we are just dealing with different structures to assist you with reviewing your tax returns. For instance, if your purpose is to give money to charities, there are certainly tax advantages to that. We will make you cognizant of those different options, so it will be economically beneficial for you.”

“I encourage everyone to seek out a financial advisor and our unique services will set you on the right path to abundance. My role is to help you do the right thing with money and if you can do that effectively you will be operating like the wealthiest of the wealthy. We can make the client so much money over time and who doesn’t want that?”

Close Up Radio will feature Heath Walters in an interview with Jim Masters on Friday December 23rd at 11 a.m. EST and on Tuesday December 27th at 1 p.m. EST with Doug Llewelyn.

Listen to the show on [BlogTalkRadio](#).

If you have any questions for our guest, please call (347) 996-3389.

For more information, visit [www.thewaltersinstitute.org](http://www.thewaltersinstitute.org)

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