Avior Wealth Strengthens Its Minnesota Tax & Accounting Division with the Addition of Gunderson, Waldvogel & Co.

On January 1, 2024, Gunderson, Waldvogel & Co. Merged with Avior, Providing Added Security and Services for Their Clients, While Reinforcing Avior's Tax Team

Avior primary logo with identity statement

OMAHA, NE, UNITED STATES, January 2, 2024 /EINPresswire.com/ -- Avior Wealth Management, LLC ("Avior") is pleased to announce a strategic merger between its Tax and Accounting division, known as Avior Tax & Accounting, LLC, with Gunderson, Waldvogel, & Co., Ltd. ("GWC"). This transformative move comes with a corresponding name change as the firm aligns with Avior's extensive suite of financial services.

Interested in partnering with Avior? Learn more here: [MeetAvior]

> "We are confident our clients' experience going forward will meet all their expectations, and this will be a positive change for all of us."
> *Gary K. Gunderson, CPA, and Jessica L. Waldvogel, CPA*

The decision to merge with Avior stems from GWC's commitment to ensuring an enhanced and sustainable client experience. Staffing challenges in the tax industry, compounded by the nearing retirement of key professionals, prompted GWC to seek a strategic partner. Avior aligns seamlessly with GWC's values and commitment to delivering quality services.

Gary K. Gunderson, CPA, an integral part of the GWC office, plans to phase into retirement while staying on as an employee of Avior for at least two years. Jessica L. Waldvogel, CPA, partner to Gary and a vital part of the team, has no immediate plans for retirement. This merger is part of a succession plan designed to ensure continuity in client service and support for years to come.

"We are confident our clients' experience going forward will meet all their expectations, and this will be a positive change for all of us." – Gary K. Gunderson, CPA, and Jessica L. Waldvogel, CPA, partners of the former Gunderson, Waldvogel & Co., Ltd.

With this evolution, clients will have access to both Wealth Management and Tax and Accounting services under the unified Avior brand. These exciting changes translate into:

1. More administrative support from Avior, allowing the GWC office to focus more deeply on serving their clients.
2. Enhanced oversight from Avior's dedicated in-house Compliance Department.
3. Fewer service interruptions, thanks to access to Avior's team and Information Technology partners.
4. Increased collaboration, ensuring an enriched client service experience.

Avior is deeply dedicated to its mission of enriching lives through a comprehensive suite of services. With a firm belief in the transformative power of effective financial management, Avior is committed to providing individuals and organizations the necessary tools, insights, and support to realize their financial goals. Across various locations nationwide, Avior delivers a broad spectrum of services, encompassing wealth management, tax planning, accounting, and strategic financial guidance, all aimed at making a meaningful impact on clients' lives. Every decision at Avior is driven by this commitment, underscoring its role as a trusted partner on the path to financial success.

About Avior Wealth Management, LLC:

Avior Wealth Management, LLC, formerly Nelson, Van Denburg & Campbell Wealth Management Group, LLC, is a SEC Registered Investment Advisor that offers financial planning and investment management services to retail and institutional clients across the United States. Avior Wealth Management, LLC and its predecessor was formed in 2008 to offer clients a holistic approach to their investments, financial planning, and wealth management. With offices in eight states, we offer clients a team approach to their financial needs. Please note, investments are not guaranteed and subject to risk, including loss of principal invested.

Audrey Keel
Avior Wealth Management, LLC
+1 210-822-5252
email us here
Visit us on social media:
Facebook
LinkedIn
Instagram
