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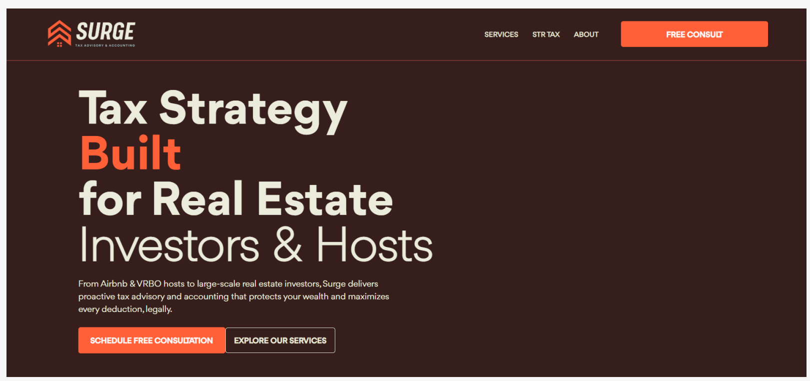
The Rise Collective Expands Its Real Estate Investor Ecosystem with the Launch of Surge Tax Advisory & Accounting

The new advisory firm delivers proactive tax planning, accounting, and wealth-building strategies designed specifically for STR hosts and real estate investors.

SURGE Tax Advisory & Accounting



SURGE Tax Advisory & Accounting website

ST. PETERSBURG, FL, UNITED STATES, July 2, 2026 /EINPresswire.com/ -- The Rise Collective today announced the launch of Surge Tax Advisory & Accounting, a specialized advisory firm built exclusively for short-term rental hosts, Airbnb and VRBO operators, real estate investors, and entrepreneurs.

As The Rise Collective expands its integrated ecosystem of companies serving the real estate investment industry, Surge provides proactive tax planning, accounting, and advisory services designed to help investors maximize deductions, improve cash flow, and build long-term wealth.

Built for Proactive Tax Strategy

Many accounting firms focus primarily on preparing tax returns after the year has ended. Surge was built to help investors make strategic tax decisions throughout the year.

By combining proactive tax strategy with ongoing accounting and advisory services, Surge helps clients make informed financial decisions before tax season arrives. Rather than reacting to tax obligations, investors receive year-round guidance designed to reduce tax liability while supporting long-term portfolio growth.

As investment portfolios grow, so does the complexity of tax planning. Surge works with clients throughout the year to identify opportunities that many traditional tax preparation firms may overlook.

> Surge was created to give investors proactive tax strategies that help them keep more of what they earn, make smarter investment decisions, and build long-term wealth.”
>
> *Elliott Caldwell*

One of the firm's primary areas of focus is helping qualifying investors leverage the Short-Term Rental Tax Loophole. When combined with strategies such as cost segregation, bonus depreciation, and proactive entity planning, eligible investors may be able to significantly reduce taxable income while remaining fully compliant with IRS regulations.

In addition to tax strategy, Surge provides bookkeeping, accounting, financial reporting, tax preparation, and ongoing advisory services that help investors stay organized, improve financial visibility, and make confident business decisions throughout the year.

Surge is backed by a team with more than 14 years of experience serving real estate investors and has helped unlock more than $102.8 million in tax savings while maintaining a 98% client retention rate across more than 400 real estate clients.

"Too many real estate investors leave money on the table by treating taxes as a once-a-year event," said Elliott Caldwell, CEO of The Rise Collective. "Surge was created to give investors proactive tax strategies that help them keep more of what they earn, make smarter investment decisions, and build long-term wealth."

Strengthening The Rise Collective Ecosystem

The launch of Surge strengthens The Rise Collective's mission of supporting investors across every stage of the real estate ownership journey. From acquiring and financing investment properties to hospitality operations, revenue management, and now specialized tax strategy, The Rise Collective continues building an integrated platform designed to help investors make smarter decisions and achieve stronger long-term outcomes.

The company's portfolio includes Home Team Luxury Rentals, a national luxury vacation rental management company, Roam Hospitality, a hospitality consulting and hotel management brand, and businesses specializing in construction, lending, real estate brokerage, marketing, business services, and investment education. The addition of Surge further expands this ecosystem by providing dedicated tax strategy and accounting services tailored specifically to the needs of today's real estate investors.

Business owners, Airbnb and VRBO hosts, and real estate investors interested in learning more about Surge can schedule a complimentary strategy consultation to identify tax-saving opportunities tailored to their portfolio and long-term financial goals.

About Surge Tax Advisory & Accounting

Surge Tax Advisory & Accounting is a specialized advisory firm serving short-term rental hosts, Airbnb and VRBO operators, real estate investors, and entrepreneurs. The firm provides proactive tax strategy, bookkeeping, accounting, cost segregation studies, entity structuring, 1031 exchange guidance, financial reporting, and year-round planning designed to help clients maximize deductions, improve cash flow, and build long-term wealth.

About The Rise Collective

The Rise Collective is the parent company behind a growing portfolio of brands serving the real estate investment, hospitality, lending, tax strategy, and business services industries. Its family of companies includes Home Team Luxury Rentals, a national luxury vacation rental management company, and Roam Hospitality, a hospitality consulting and hotel management brand, alongside businesses specializing in construction, real estate brokerage, financing, marketing, and advisory services. Together, these companies create an integrated ecosystem designed to help investors, entrepreneurs, homeowners, and hospitality operators build, manage, and grow high-performing real estate and hospitality businesses.

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