

## Bio | AMY LIBERTOSKI

Amy Libertoski, CPA, PFS, knows that a client's personal prosperity is tied not only to their dreams of college and retirement, but also how to give back to their communities in different ways and reduce their overall tax burden. A certified public accountant with nearly 20 years of experience in individual tax and personal financial services, Amy helps to simplify her clients' financial lives and give them confidence to act today while planning for tomorrow. This can mean different things for a young family compared to a widow or retired entrepreneur.

"I work with individuals on issues that can range from how to invest an inheritance to how to fund and operate a private family foundation," Amy explains. "My work involves a lot of education, but it feels good to have clients come to me to learn about their options before they make a decision."

Amy has a strong individual tax and compliance background and expertise in the not-for-profit area as well as her personal financial planning experience. A CPA for Wipfli LLP in Wisconsin since 2003, Amy is also a registered investment advisor representative and holds a Personal Financial Specialist (PFS) designation.

Amy is a member of the American and Wisconsin Institutes of Certified Public Accountants (AICPA and WICPA). Amy also serves her community as the treasurer for Kids Voting USA of Wisconsin Inc., a schools-based program designed to educate children about voting and increase voter registration in the state.

In her spare time, Amy enjoys reading and spending time with her husband and three children.

*"Really knowing and serving my clients and their families well is what drives me. It's professional and personal attention, all in one. Of course, I'm committed to excellence in our business relationship – prompt calls and call returns, anticipating needs, and regular reviews. That commitment extends to excellence in all aspects of our relationship – their financial lives, their business lives, their community involvement, and their families. I want them know that I care."*



### **A Career in Individual Tax and Personal Financial Planning**

CPA with Wipfli LLP; Nearly 20 years of accounting and tax experience; Wipfli Family Office services consultant; Tax planning and compliance for individuals, non-profits and private family foundations

### **Education**

B.A. in Accounting from the University of Wisconsin-Superior  
AICPA Personal Financial Specialist

### **Contact Amy**

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