Canty Financial Management, Inc.

Canty Financial Management is a locally owned Tax and Investment Advisory firm located in the historic Verbeck House on Church Avenue (Route 50) in the Village of Ballston Spa. Village resident Bill Canty started the firm in 1986 as a part-time venture while working full-time with the NYS Comptroller. Today Canty Financial Management operates full time and has over 1,000 tax preparation clients and 70 investment advisory clients.

Bill volunteers his time for two community service organizations. He is currently the President of the Ballston Spa Rotary, and the Chair-Elect for the Saratoga County Chamber of Commerce. He is slated to become the Chairman of the Chamber Board in 2006 and will be continue to be an advocate for the business needs of Ballston Spa. Mr. Canty is a *Certified Public Accountant* and *Certified Financial Planner* and graduated from Niagara University in 1985. He obtained his CPA experience as an auditor with the NY State Department of Taxation and the NY State Comptroller. Professional licenses include CPA, CFP, Health & Life Insurance, and NASD series 6, 7, 63, and 65.

Canty Financial has three full-time employees, and during the January to April tax season the staff grows to a total of 10 people. The office manager is Maureen Walsh, and the primary tax planner is Tina Alteri, CPA. Mr. Canty works closely with Tina to help clients reduce their taxes and focuses most of his efforts on the investment advisory side of the business.

The firm is still taking on new business and offers a $25 discount for new clients. Do you need help managing your investment portfolio? Changing jobs? Retiring? Canty Financial can help you out. They specialize in IRA rollovers, investment management, and tax planning.

Investment Decisions Always Affect Your Taxes: This important fact sets our firm apart from most other financial advisory firms. Since *every investment decision you make has an impact on your taxes*, we feel that you benefit when your investment advisor is the same person who also plans and prepares your tax strategy.