Jason Katz, CFP®, CFA, CEPA

Wealth Advisor, Principal

Jason Katz, CFP®, CPA, CEPA, is a Wealth Advisor and Principal at Bartlett Wealth Management. He provides strategic income tax planning, estate planning and other comprehensive wealth planning services to individuals and their families. Jason is a Certified Financial Planner, a licensed Certified Public Accountant in Ohio and Illinois and a Certified Exit Planning Advisor. Jason received his Bachelor of Science from Indiana University with Honors Distinction in Accounting and Finance.

Before joining Bartlett, Jason spent over seven years providing comprehensive financial and tax planning services at a single-family office. Prior to that, Jason spent four years at Deloitte, offering tax planning, financial counseling and wealth planning solutions to individuals, their families and businesses.

Jason joined Bartlett Wealth Management in 2017, and has over 16 years of experience in financial planning. He is passionate about solving complex financial planning issues with optimal solutions, staying on the cutting edge of tax legislation and working with clients and other advisors to build strategies to save on taxes.

Areas of Expertise

Comprehensive planning for ultra-high net worth families

Income tax planning

Estate planning and wealth transfer strategies

Charitable planning

Business succession planning

Interview and Media Experience

Your year-end tax planning checklist, Cincinnati Business Courier

How to preserve wealth long-term, Cincinnati Business Courier

2019 Estate Planning Forum, Cincinnati Business Courier

Year-end tax tips and how the GOP tax plan could affect you, WVXU-FM

How to declutter your financial papers, WVXU-FM

Public Speaking Experience

2019 Estate Planning Forum, Cincinnati Business Courier – see link above

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