



INDEPENDENT ADVICE

TAXES, INSURANCE & INVESTMENTS

Kapper & Company Fact Sheet

Since 1986, Kapper & Company Ltd. have been serving the Southeastern Illinois area, providing our clients with expert advice in the areas of taxes, business planning, estate planning, QuickBooks assistance as well as numerous other tax & financial services.

Our clients expect the best and we consistently aim to deliver. At Kapper & Company Ltd., we are constantly updating ourselves with the most current and advanced planning techniques, while also keeping up with the ever changing State & Federal tax law changes. We were on the cutting edge of the Affordable Care Act. Our advice and knowledge led to our clients saving over \$333,000 in health insurance premiums during 2014.

As client needs advanced over the years, Kapper & Company Ltd. expanded our services. In 1994, Dennis Kapper became an Investment Advisor. Starting with only mutual funds, our office has evolved to offer a wide range of investment choices for our clients. As of 2014, our clients now have access to a full-service brokerage house through Packerland Brokerage Services Inc. Please speak with Andrew Kapper about your investment needs.

As Independent agents, Kapper & Company Ltd. also offers life, health, disability & long term care through multiple insurance companies to give our clients multiple choices. We have the ability to provide insurance & investment services to individuals as well as businesses.

As of January 1st, 2015, Kapper & Company Ltd has partnered with JobWorks Inc. here in Olney IL, to help our clients address staffing issues, as well as payroll, workers compensation & Illinois unemployment issues.

We feel that these services help our clients receive well-rounded, independent & objective advice. For the past 30 years we've been successful because we put the needs of the client first. We look forward to the next 30 years and beyond of doing business the same way.

SERVICES AVAILABLE

What Do We Do?

Taxes & Accounting Services

- Individual Tax Preparation
- Corporate Tax Preparation
- Charitable & Non-Profit Tax
- Auditing
- Book Keeping & Payroll including QuickBooks

Business Services

- Business Succession Planning
- Cash-flow & financial statements analysis
- Insurance & Expenditure analysis

Retirement Services

- Retirement planning – Social Security sign up & planning
- Financial Needs Analysis
- Retirement Spending Strategies
- Estate Planning

Investments Services

- Stocks
- Bonds
- Fixed Annuities
- Variable Annuities
- IRA's
- 401 (K) Rollovers