



Charles Bridge Partners

OUR TAX PLANNING APPROACH

Fort Worth, Texas · charlesbridgepartners.com

OUR PURPOSE

Help you win.

Wealth isn't money. It's time.

WHO WE ARE

Plan for decades. Steward for generations.

Charles Bridge Partners is a planning-led firm built on a simple conviction: your tax return, your financial plan, and your portfolio are one system — and they should be managed like one. We serve business owners, athletes, and families, building wealth so they can focus on what really matters.

OUR TAX PLANNING FOCUS

Know your numbers.
Keep more of what you make.

THE FRAMEWORK

The 3 Pillars of Financial Clarity.

The 3 Pillars

Simple on purpose.

01

ACCOUNTING

The Foundation

Know your numbers. No April surprises.

02

TAX PLANNING

The Shield

Active, year-round planning to keep more of what you make.

03

FINANCIAL PLANNING

The Engine

Connect it all with your investments — and flourish.

HOW WE WORK THROUGH THE YEAR

Proactive, not reactive.

Project

QUARTERLY

Income projections and estimated payments, kept current all year.

Plan

DURING THE YEAR

Strategy moves to maximize what you keep.

File

BY APRIL

No surprises. The return confirms decisions already made.

Prep vs. Planning

TAX PREP LOOKS BACK

Once-a-year filing

April surprises

Deductions found too late

TAX PLANNING LOOKS AHEAD

Year-round strategies that reduce your tax bill

Clarity

Keep more of what you make

Next Steps



A free discovery call to look at where you are.



Share your last return. We'll show you what it's been missing.

OUR PROMISE

We will help you set the foundations
that bridge to generations.



Charles Bridge Partners

CONTACT

682-330-1255

tj@charlesbridgepartners.com

charlesbridgepartners.com

Charles Bridge Partners ("Charles Bridge") provides tax planning and tax preparation services. Tax services are provided by Tomas Jirousek, EA, an Enrolled Agent admitted to practice before the Internal Revenue Service. This document is educational in nature, is provided for informational purposes only, and does not constitute tax, legal, or investment advice. Outcomes depend on individual facts and circumstances, and no particular result is guaranteed. Charles Bridge is not a registered investment adviser; any investment services referenced are not yet offered and are expected to launch upon completion of applicable examinations and registrations.