Full Bio

Steven Jarvis, CPA is the CEO and Head CPA at Retirement Tax Services, a tax firm focused on working *with* financial advisors to change the world one tax return at a time. In this role Jarvis spends his time working with real financial advisors and taxpayers to help find opportunities to not tip the IRS. Afterall, there are no patriotic awards for overpaying taxes.

With over 10 years of experience (and counting) as a CPA, Jarvis has the hands-on experience to create actionable content for his audience. He has been featured in industry publications including Advisor Perspectives and regularly produces content for financial advisors through the Retirement Tax Services website and the Retirement Tax Services Podcast. His experience covers written content, public speaking at leading industry conferences and 3 years as an adjunct professor in the graduate business school at Whitworth University.

"Steven regularly speaks on a variety of tax topics for financial planners but always keeps his focus on how attendees can take action (information only has value if it is implemented!). Some of Steven's favorite topics to cover include:

- Common mistakes advisors make on tax planning and how to fix them
- The real math on Roth conversions and how to effectively communicate them with clients
- Collaborating with CPAs and building great COI relationships
- Incorporating tax planning into the a financial planning practice
- NEW - Secure Act 2.0 and what to do about it for tax planning

Steven's years of experience and time working with hundreds of financial advisors gives him the ability and expertise to speak on a variety of topics, so if there is a tax topic you don't see on the list you'd love to hear him speak on, just ask!"