



EXCELLENCE

INTEGRITY

RELIABILITY



SOL SCHWARTZ & ASSOCIATES, P.C.
CERTIFIED PUBLIC ACCOUNTANTS

7550 IH-10 West, Suite 1200
San Antonio, Texas 78229
T 210-384-8000 | F 210-384-8011
www.ssacpa.com



**Sol Schwartz
& Associates, P.C.**
Certified Public Accountants

**HEALTHCARE
SERVICES**

Sol Schwartz & Associates, P.C. provides a broad spectrum of services to a physician's medical practice, creating an increasingly solid foundation for medical excellence. Results oriented, our purpose is to help your practice become more efficient and better positioned to respond to any environment. We understand the healthcare industry and offer many years of in-depth knowledge and technical skills to assess your distinct practice needs.

ACCOUNTING SERVICES

- Tax Planning & Preparation
- Estate & Gift Tax Planning
- Financial Statement Preparation
- Bookkeeping
- IRS Representation

STRATEGIC PLANNING

- Personal Financial Planning
- Compensation Analysis
- Asset Protection
- Business Succession

OTHER SERVICES

- Implementation of Internal Controls
- Selection of Optimal Tax Entity
- Purchase or Sale of Medical Practice
- Audit



Jim Rice, CPA

Bennett Allison, CPA/CFP

Jim Rice, CPA, Shareholder

jprice@ssacpa.com

A summa cum laude graduate of St. Mary's University, Jim Rice has been practicing public accounting for over 30 years. With his extensive knowledge of the tax laws and vast experience in public accounting, Jim has identified many tax saving ideas that have helped his clients over the years. Jim's area of practice is primarily income tax planning and consultation for successful individuals and their various endeavors. He has developed a high level of expertise servicing a large medical practice client base. He also works frequently with family-owned businesses, and for the past several years, has been involved in litigation support work. Jim's specific areas of focus include asset protection, short and long-term income tax planning, estate tax planning, and choice of entity planning.

As a reflection of Jim's commitment to San Antonio, he has served as Treasurer of the American Diabetes Association - San Antonio Chapter and Rotary Club of San Antonio. He is past president of the San Antonio Association of Hispanic CPAs and Board Director at Communities in Schools. Jim was previously awarded Volunteer of the Year at Communities in Schools and Mentor of the Year by the San Antonio Area Mentorship Association. He is an alumnus of Leadership San Antonio and Texas Lyceum Association.

Bennett Allison, CPA/CFP, Shareholder

cba@ssacpa.com

Bennett Allison provides tax planning and compliance services to a variety of closely held business and family groups. He has 14 years of public accounting experience serving corporations, partnerships, and individuals. During his career, Bennett has helped his clients implement many advanced planning solutions tailored to fit their unique needs. Bennett works closely with physician groups and doctors assisting with tax compliance and advising on tax and other planning matters. Bennett is a Certified Public Accountant and a Certified Financial Planner™. Bennett was recently recognized by *The San Antonio Business Journal* as one of the 40 Under Forty Rising Stars.

Bennett and his wife, Monica, have two daughters, Katie and Abby. When not working, Bennett enjoys spending time with his family.