

PRIVATE CLIENT SERVICES

Personalized Guidance for Every Stage of Wealth

Whitley Penn's Private Client Services team helps individuals and families simplify financial complexity, preserve wealth, and build lasting legacies. Through coordinated tax, accounting, advisory, investment, and family office solutions, we provide personalized strategies aligned with your financial goals.

Supporting Your Wealth Journey

Our professionals work across tax, wealth management, accounting, risk, technology, and transaction advisory to provide coordinated guidance through every stage of your financial journey.

Growing Your Wealth

- Strategic Tax Planning
- Investment & Wealth Management
- Business Accounting & Advisory
- Business Operations Optimization
- Mergers, Acquisitions & Sales
- Mineral & Royalty Management
- Financial Reporting & Decision Support

Preserving Your Wealth

- Asset Protection & Risk Management
- Family Office Services
- Tax Compliance & Reporting

Wealth Transfer & Legacy

- Estate & Gift Planning
- Multigenerational Wealth Transfer
- Charitable & Philanthropic Planning
- Family Governance
- Trust & Estate Support
- Legacy & Succession Strategies

Providing Personalized Strategies for:

- Individuals
- Families
- Entrepreneurs
- Retirees
- Philanthropists
- Athletes
- Those with long-term wealth
- Those building wealth

Your Future is Our Focus

What Makes Our Private Client Services Different?

For many private clients, personal wealth is closely connected to business ownership, investments, real estate, mineral assets, and family priorities. Our professionals bring together specialized services to help address the complete financial picture.

Learn more:



One Integrated Team

Your advisors collaborate across tax, wealth, accounting, risk, and transaction services to provide you with a unified strategy.

Experience With Every Stage of Wealth

From first-generation wealth creators to established family offices, we help our clients navigate growth, preservation, and succession.

Personal Attention, Extensive Resources

Receive the responsiveness and attention of a trusted local advisor backed by the resources and technical depth of a leading advisory firm.

Contact an Advisor to Get Started



Kristen Sayegh
Tax Partner



Bryan McClune
WPWealth Partner



Ashley Kimery
CAAS Partner



Eric Goff
Tax Partner

