

NEWS

For Immediate Release

Media Contact:

Jonny Swift

Impact Communications, Inc.

913-649-5009

JonnySwift@ImpactCommunications.org



Braun-Bostich & Associates Lead Advisor Cassandra Kirby Earns CPA License

*Enhancing comprehensive wealth management firm's
commitment to comprehensive planning*

CANONSBURG, PA (April 30, 2025) – Cassandra Kirby, partner and lead advisor at [Braun-Bostich & Associates](#), an SEC Registered Investment Advisor and comprehensive financial planning firm located in greater Pittsburgh, has earned her Certified Public Accountant license in the state of Pennsylvania.

Joining Braun-Bostich in 1999, Kirby has been an invaluable member of the firm for over 25 years, maintaining and overseeing the firm's compliance program and creating unique tax planning strategies for the firm's clients that align with their overall needs and goals. She has continued to grow in her abilities to build and manage wealth for her clients, becoming a Certified Financial Planner (CFP®) in 2009 and becoming an Enrolled Agent (EA) in 2014.

“Earning my CPA license is a significant milestone in my career, and I'm excited about the additional value I can bring to our clients at Braun-Bostich & Associates,” said Kirby. “This achievement will deepen my ability to provide strategic tax planning and financial guidance, ensuring that we at Braun-Bostich & Associates continue to offer holistic, well-rounded solutions tailored to each client's needs.”

Kirby and the team at Braun-Bostich & Associates, with over \$200 million in assets under management (AUM), provide comprehensive wealth management solutions to high-net-worth individuals, families, and businesses. Committed to helping clients achieve their financial goals and enhance their overall financial well-being, the firm develops personalized strategies tailored to each client's unique needs – guiding them toward long-term financial independence and security.

With her CPA license, Kirby can now provide deeper insights into tax strategies, helping clients minimize liabilities and optimize tax-efficient investment and retirement strategies. By obtaining this license, Kirby has demonstrated she has the ability to better help clients navigate evolving tax

laws and regulations, ensuring compliance while identifying opportunities for financial optimization. More so than most advisors, she can better understand complex financial and tax challenges, with the CPA license being an indicator that she and the firm can offer more sophisticated solutions to such challenges.

CPA REQUIREMENTS IN PENNSYLVANIA

Earning a CPA license in Pennsylvania is a rigorous process that requires a strong commitment to education, experience, and ongoing professional development. Candidates must complete 150 credit hours of education, including at least 24 credits in accounting, auditing, business law, economics, technology, finance, or tax. They must also fulfill at least 12 months of qualifying work experience, totaling a minimum of 1,600 hours within a 60-month period prior to application. Additionally, candidates must pass all four sections of the CPA exam and maintain their certification by completing 80 hours of continuing education every two years – covering key areas such as ethics, accounting, auditing, and taxation.

This process assures clients and prospects that a financial advisor with this qualification can offer comprehensive financial expertise with a deep understanding of the latest financial regulations, as well as the best ways to ensure financial decisions are both tax-compliant and tax-efficient.

TAX CHECKLIST AND FINANCIAL DATA AND DEADLINES

To provide additional value to clients and prospects, Braun-Bostich & Associates recently put out a handful of resources for taxpayers and investors on their website. The first was a 2024 Tax Checklist, featuring a to-do list with tips for taxpayers regarding gathering all your forms, rounding up your receipts, acquiring records of charitable contributions, creating a list of personal information, getting a copy of last year's tax return, special circumstances, determining how you'll use your tax refund, and more considerations for tax planning and preparation, regardless of whether you're working with a tax professional or preparing taxes yourself.

The resources also included a guide providing Key Financial Data for 2025, featuring 2025 tax rate schedules, standard deductions and child tax credits, gift and estate tax exclusion and credits, education credits, deductions, and distributions, tax deadlines, retirement plan and IRA contribution limits, limits and deductibles on health savings accounts, long-term care premiums, Medicare, social security, and more. Finally, the firm will be providing a guide with Key Planning & Investment Deadlines for each quarter of the year. The recently released Spring 2025 guide provides financial dates and deadlines, as well as special observances, for April, May, and June, with a special focus for each month.

Access all of these resources on the [Financial Data & Deadlines](#) page on the firm's website. To access additional resources and insights from the Braun-Bostich & Associates team, including educational blog posts, articles, podcast episodes, videos, and an eBook, please visit the [Insights & Resources](#) page of the website.

ABOUT BRAUN-BOSTICH & ASSOCIATES

Braun-Bostich & Associates is a comprehensive financial planning firm and Registered Investment Advisor based in Canonsburg, PA, delivering a range of wealth management solutions to high-net-worth individuals, families, and businesses in order to help them meet their goals and optimize

their financial life. Founded by Amy Braun-Bostich, CEO and Founding Partner, Braun-Bostich & Associates is focused on securing the wellbeing of clients and their loved ones for years to come. By creating strategies designed for their clients' unique needs, they help develop a roadmap to financial independence. Learn more at www.Braun-Bostich.com.

###