



Eric E. Gurholt, CPA/PFS, CFP®
Shareholder

Phone 920.923.8400

Fax 920.923.8410

egurholt@hubertycpas.com

145 S. Marr St., Suite 2 | Fond du Lac, WI 54935

www.HubertyCPAs.com

PROFILE

Eric's experience includes specializing in tax and financial compliance and consulting for small business owner's and individuals. He has assisted his clients in building a solid financial future through incorporating tax, wealth, and risk management tools and techniques in a way that ensures they are on track to meet their goals and objectives.

He has also assisted businesses and individuals with various matters such as estate planning, asset spend down analysis, social security planning, business ownership succession planning, and representation before federal and state tax agencies. Eric has worked with high net worth individuals in creating a long term financial plan that addresses the needs, wants, and goals of the entire family including grandparents, children, grandchildren, and other immediate members of the family.

Focus Areas

Wealth Management

Consulting

Small Business

Tax Planning & Compliance

INTERESTING FACT

Eric is an avid runner who puts on average over 20 miles per week. He enjoys outdoor activities that include biking, golfing, boating, and snow shoeing. He is active in the community including volunteering as an ambassador for the Fond du Lac Association of Commerce as well as an active member of the Young Professionals of Fond du Lac.



Education

- BS Accounting – University of Wisconsin, Oshkosh
- BS Finance – University of Wisconsin, Oshkosh

Professional Affiliations

- Member – American Institute of Certified Public Accountants (AICPA)
- Member – Wisconsin Institute of Certified Public Accountants (WICPA)
- CPA/PFS, CFP®

Areas of Specialty

- Financial Planning
- Tax Planning & Compliance
- High Net Worth Individuals
- Gift & Estate Tax Planning
- Insurance & Risk Management
- Business Succession Planning

Industries

- High Net Worth Individuals
- Closely-Held Businesses