

A Trusted Voice in a Complicated World

THE EXPERTISE IS THE POINT

Harvey Bezozi, CPA, CFP®, CFO

BUSINESS FINANCE SPECIALIST | TAX EXPERT | AUTHOR & INDUSTRY LEADER



There's a classic finance joke that asks... What do you get when you put 10 economists in a room? Answer - 11 opinions.

And so it often goes with financial advice. It can be inherently confusing and difficult to navigate. In the end you find yourself asking, which way do I turn?

Having one, confident, expert, well-informed voice in the room leading you or your organization through challenging terrain can make all the difference.

Harvey Bezozi is one such voice. Harvey provides an expert perspective on finance, financial planning, and current trends in tax policy and the impact these have on people, families, businesses, and high-net-worth individuals.

The vision and mind behind **YourFinancialWizard.com**, Harvey has run his own boutique financial advisory firm in Boca Raton, Florida since 1994, providing tax advice, financial planning, and CFO services to some of the most successful and recognizable figures and businesses in America and around the world.

Notable & Quotable

Harvey Bezozi is fast becoming one of the most quotable experts in the financial press. He's written for and been quoted in many of the most respected publications in finance.

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Money



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TAX WIZARD | CFO WATCHDOG | FINANCIAL FIXER

Harvey Bezozi created **Your Financial Wizard** with a singular mission: to provide concierge-level work product and service, along with seamless communication, high energy, and a super-positive attitude to clients with multiple businesses and investments who require sophisticated tax planning, brilliant CFO financial and negotiation skills, and a forensic approach that looks at things from every angle in order to get the best possible results.

With one of the most knowledgeable and well-connected tax & accounting professionals in the world at the helm, **Your Financial Wizard** serves clients in all 50 states and internationally, and focuses on three principal areas of practice.



CFO SERVICES - Outside CFO services for a wide variety of businesses, individuals, and families, managing all of their tax, accounting, and finance needs.



TAX SOLUTIONS - Negotiate and solve complex IRS and state tax cases for high-profile business executives, entrepreneurs, celebrities, athletes, and more.



FINANCIAL STRATEGY - Replace the client's current CPA firm with a "fresh set of eyes" to realize the best outcomes.

Pedigree

Harvey made his bones working early in his career with two of the largest and most prestigious accounting firms in the world.

- Coopers & Lybrand (now PriceWaterhouse Coopers), reformulating the convoluted inter-company billing system during the highly visible divestiture of AT&T, as well as managing the financial audit of the S.W.I.F.T. global interbank funds transfer system.
- Peat Marwick (now KPMG) where he prepared and reviewed the tax returns of many prominent political figures, real estate and business moguls, and A-list entertainers, athletes, and rock stars.

Originally from New York, Harvey graduated from the University of Maryland with honors and worked in Washington, DC, before relocating to Florida.

Contact Harvey

Get a quote from Harvey as a financial expert or talk about having him write for your publication.

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Harvey Bezozi, CPA, CFP[®], CFO

Harvey Bezozi is being quoted in some of the nation's most distinguished financial publications. Read a few articles citing his expertise here.



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BY IRINA IVANOVA

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Interview with Harvey Bezozi, Founder at Your Financial Wizard

February 28, 2018



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Starting a business is a big achievement for many entrepreneurs, but maintaining one is the larger challenge. There are many standard challenges that face every business whether they are large or small. It is not easy running a company, especially in a fast-paced, ever-changing business world. Technology advances, new hiring strategies, and now, political changes coming with the new administration, all add to the existing business challenges that entrepreneurs, business owners, and executives have to deal with.

Maximizing profits, minimizing expenses and finding talented staff to keep things moving seem to be top challenges for both SMBs and large corporations. We have been interviewing companies from around the world to discover what challenges they are facing in their businesses. We also asked each company to share business advice they would give to a younger version of themselves.

Below is our interview with Harvey Bezozi, Founder at [Your Financial Wizard](#):

What does your company do?

Our company provides four types of services to clients. We (1) help negotiate tax-debt settlements for individuals, businesses and business owners that owe between \$50,000 and into the millions of dollars to the IRS; (2) provide outside CFO services to companies and wealthy individuals, managing all of their tax, accounting and finance functions; (3) serve as business managers and royalty auditors for creative artists, handling everything to do with money and numbers for a wide variety of very famous Hollywood celebrities; and (4) replace the current CPA firm when a client is looking for a "fresh set of eyes." Our mission is to provide concierge-level work product and service, along with seamless communication, high energy and a super-positive attitude. We are located in Boca Raton, Florida, and have been in business since 1994. We serve clients in all 50 states and internationally.

What is your role? What do you enjoy most about your role?

I am the president of Harvey I. Bezozi, CPA, P.A., and the owner of Your Financial Wizard. My professional career started back in 1982 when I accepted a job with one of the Big Eight accounting firms in Washington, DC. At that firm, I had the opportunity to work on financial reporting and tax filing for international public and private companies. Shortly thereafter, I became very interested in tax consulting, the role of the CFO in corporate finance and the inner workings of the entertainment industry. After partnering with a retired IRS agent who taught me how to help clients with serious IRS problems, I started my own company in this field. I am passionate about helping my clients and working closely with them. I enjoy providing brilliant, level-headed advice -- in a no-nonsense, drama-free and extremely results-oriented fashion.

What are the biggest challenges in your business right now?

It has always been a challenge to persuade my clients to follow an expense budget in their personal lives. They typically adhere to the business budgets we prepare together. When it comes to personal budgets, however, they tend to overspend and "live above their means" -- no matter how much they earn from their businesses or investments.

Another challenge I face is the proper management of information, technology and devices. Our society has become addicted to emails and texting, so I encourage my staff and our clients to manage communications properly and set a specific time to appropriately "unplug and recharge." Clients always come first, and I will quickly "plug back in" when a client needs me. Impeccable client service rules!

If you could go back in time, what business advice would you give to a younger version of yourself?

I would advise myself to find intelligent and successful mentors. Research consistently shows that the most successful business owners surround themselves with brilliance of all kinds. Success is contagious -- so surround yourself with it.

Next, become a diligent goal setter. It is best to base your goals on what you value in life. So do your homework, engage in some soul searching and reflection, determine what really matters to you in life, and set your goals accordingly.

And, most importantly, be of service to others. If you provide others with something that makes their lives easier and helps them, then you are guaranteed success!

