Jeffrey Arsenault

CPA, PFS, CFP®, MST, RLP®

PARTNER

Experience

Mr. Arsenault is the lead Partner of The MFA Companies'® Individual & Family Tax Practice as well as a co-founder of its Wealth Management Practice. Jeff provides tax consulting and compliance services to MFA's high net worth customers; advising them with respect to income, gift and estate tax planning, multi-generational tax planning and charitable planning. He also counsels on complex and multi-jurisdictional tax matters involving family estates and trust holdings. For owners of privately held businesses, Jeff provides proactive tax consulting services that span the entire stakeholder life, from equity and structure planning for business founders to exit planning strategies and beyond.

Bringing more than 20 years of experience to the Wealth Management Practice, Jeff provides comprehensive investment management services to high net worth individuals and families. He both advises and educates customers, identifying the advantages and consequences of alternative courses of action regarding investments and wealth planning. Jeff is skilled in overseeing and coordinating the efforts of customers' various professional advisors to assure cohesive and timely solutions. Additionally, Jeff is a Registered Life Planner, applying the life planning skills and methodologies taught by the Kinder Institute of Life Planning to the professional practice of financial planning. He has helped numerous customers successfully align their money with what's most important in their life by creating viable, long-term financial and investment strategies that support their unfolding life plan and its financial requirements.

Expertise

- Individual and family tax services
- Estate and trust tax services
- Investment management
- Asset allocation planning
- Financial life planning and goal setting
- Estate planning and wealth transfer strategies
- Retirement planning
- Life and disability insurance planning
- Charitable planning
- Equity based compensation planning
- Family and business succession planning
- Educational planning
- Family office advisory and family meeting facilitations
- Cash flow management

Education

- MST – Master of Science in Taxation; Bentley College
- BS – Business Administration, Accounting; University of Massachusetts, Amherst

Certifications

- CPA – Certified Public Accountant
- PFS – Personal Financial Specialist (AICPA)
- RLP® – Registered Life Planner
- CFP® – Certified Financial Planner
- Series 66 NASD

Professional Affiliations

- American Institute of Certified Public Accountants
- Massachusetts Society of Certified Public Accountants
- Institute of Certified Financial Planners
- Kinder Institute of Life Planning
- Financial Planning Association
- Boston Estate Planning Council

MFA COMPANIES

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