

About Us

Selecting an accounting firm is no small decision. After all, you are choosing the professionals into whose hands you are entrusting your business or personal finances. At Casey Neilon, our goal is to be a solution for clients who need a partner in pursuing new and exciting veins of entrepreneurial success. We are committed to our clients, committed to excellence, and committed to our community.

The Casey Neilon Promise

Our firm focuses on serving all types of entrepreneurs, from owners and key stakeholders in successful and growing businesses to serial entrepreneurs who hold equity in multiple operations simultaneously. We understand that businesspeople have complicated financial and business lives and that the complexities often bleed over into their personal lives as well. That is why we specialize in meeting the entire gamut of their unique needs.

Services

- Tax Services
 - Tax Planning
 - Tax Return Preparation and Assistance
- Business Services
 - Consulting and Strategic Planning
 - Comprehensive Financial Planning
 - Accounting Services, including Forensic Accounting
 - Succession Planning
- Captive Insurance
- Trust and Estate Planning
 - Wills and Trusts
 - Power of Attorney
 - Probate
- Audits and Assurance
 - Audits by External Auditor
 - Reviews
 - Compilations
 - Support for specialized accounting and reporting requirements.
 - Virtual Accounting Services (VAS)
 - Virtual Accounting Services is a low-cost, efficient bookkeeping option for small businesses. VAS will help you save time and keep your accounting records organized by eliminating tedious accounting data entry tasks.

Casey Neilon partners with a trusted outsourced group of Accountants to offer this service to clients. VAS was created by CPAs, so you'll receive the benefits of using a CPA-approved tech stack and set of procedures, without paying CPA service prices.

“

Casey Neilon is much more than your average accountant. The service is more personal and individualized to my unique situation. They understand how to work with entrepreneurs who have complex holdings and have a lot on their plate. Casey Neilon helps me run a more profitable business and keep more of my hard-earned money.”

Jason Lococo
Entrepreneur

“

I was looking for a very knowledgeable and responsive accounting firm who could help us through a complex business restructuring. What I've found in Casey Neilon is so much more than that. The bottom line is that we've saved money on both our personal and corporate taxes. They have helped us not only to save money over time, but to leave a better legacy for our children.”

Jim Collingso
Entrepreneur



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