Jason Uetrecht, CPA, PFS, CFP, AEP

Partner

314.290.3283

jason.uetrecht@rubinbrown.com

Jason Uetrecht is the Partner-in-Charge of RubinBrown's Private Client Services Group. He has extensive experience in providing comprehensive income tax, estate tax, financial planning and investment advisory services to business owners, senior executives, high net worth families and family office clients.

Jason joined RubinBrown in 2012. Prior to joining RubinBrown, he was a Tax Director of Personal Financial Services at PWC for over 14 years. He specialized in providing clients with sophisticated income tax and estate planning strategies, including wealth transfer techniques, lifetime giving strategies, charitable giving and technical analysis in income, estate and gift areas.

Specific Experience/Expertise

- Entity structure and business planning
- Tax and financial planning
- Stock option planning
- Retirement planning
- Estate planning
- Investment advisory
- Tax compliance

Education

- Master of Taxation, University of Denver
- B.S., Business Administration, Accounting, St. Louis University

Professional Organizations

- Member and Personal Financial Planning Executive Committee, American Institute of Certified Public Accountants
- Member, Missouri Society of Certified Public Accountants
- Member, Financial Planning Association
- Member, Estate Planning Council of St. Louis
- Member, Partnership for Philanthropic Planning
- Member, National Association of Estate Planners
- Member, CFP Mentor Program

Community Involvement

- Member, Board of Directors, Youth in Need
  - Member, Development Committee
  - Member, Planned Giving Committee
- Former Board Member and Treasurer,
  Saint Louis Planned Giving Council
- Former Member and Treasurer, Chaminade College Prep Alumni Board of Directors
- Former Corporate Achievers Top Fundraiser, Multiple Sclerosis Society