Julie A. Welch

Managing Partner & Director of Taxation

Meara Welch Browne, P.C.

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General Bio

Julie A. Welch (Runtz) is the Managing Partner and Director of Taxation at Meara Welch Browne, P.C. She handles high-level, complex taxation matters for businesses, their owners, and high net-worth individuals to assist with strategies to minimize tax.

In her daily work, Julie consults on taxation issues including the areas of retirement planning, education planning, charitable and planned giving, employee benefits, and many other financial related areas.

She is also an active speaker and author on various tax, accounting and wealth management topics. In addition, Julie has co-authored and published "101 Tax Saving Ideas" with Randy Gardner, soon to be in its 11th edition.

Julie is an active member of numerous professional and community organizations, as well as a member of the Wolters Kluwer Financial and Estate Planning Advisory Board. She is also a frequent co-columnist for the *Journal of Financial Planning* and *CPA Magazine*.

A leader in her field, Julie has been recognized by local and national media, including the *Kansas City Business Journal*, the Missouri Society of CPAs, the American Institute of Certified Public Accountants, *Ingram's* magazine and the National Association of Estate Planners & Councils.

Julie earned her undergraduate degrees in accounting and business administration from William Jewell College, and her master's degree in accounting, with a taxation focus, from the University of Missouri-Kansas City.

Education

- William Jewell College, Bachelor of Science in accounting and business administration
- University of Missouri-Kansas City, Master of Science in accounting, taxation focus

MEARA WELCH BROWNE, P.C.

Certifications

- Certified Public Accountant (Licensed in Missouri, Kansas and Florida)
- Certified Personal Financial Specialist (PFS)
- Certified Financial Planner (CFP)
- Accredited Estate Planner (Distinguished)

Professional Associations

- American Institute of Certified Public Accountants, Member, 1982-present
- Missouri Society of Certified Public Accountants, Member, 1981-present
- Federal Estate Planning Symposium, Committee Member, 2000-present
- Financial Planning Association (formerly International Association for Financial Planning), Member, 1995-present

Honors + Awards

- National Association of Estate Planners & Councils, Estate Planning Hall of Fame, 2019
- American Institute of Certified Public Accountants, Sidney Kess Award for Excellence in Continuing Education, 2015
- *Ingram's* Magazine, Women Executives in Kansas City, 2011
- Missouri Society of CPAs, Women to Watch, Experienced Leader, 2007
- *Kansas City Business Journal*, Women Who Mean Business, 2003
- University of Missouri-Kansas City, Alumni Achievement Award, 1999

Recent Publications and Presentations

- American Institute of Certified Public Accountants, Tax Strategies for the High-Income Individual Conference, "Taking it Home! Best Tax Ideas: Panel Discussion," Moderator, 2019
- American Institute of Certified Public Accountants, Tax Strategies for the High-Income Individual Conference, "Inside the Tax Studio," Panelist, 2019
- American Institute of Certified Public Accountants, Advanced Personal Financial Planning Conference, "Best Planning Ideas," Panelist, 2019
- American Institute of Certified Public Accountants, Advanced Personal Financial Planning Conference, "Health Savings Accounts," 2019
- University of Missouri-Kansas City, Continuing Legal Education, Recent Developments in Federal Taxes, Individual Tax Update, Program Moderator, 2019
- Plaza Club, Tax Reform Changes, 2018
- Journal of Financial Planning in the Round, Tax Law Changes, Panelist, 2018
- Surgent, Tax Cuts and Jobs Act One Year Later – Individual Tax Changes, Webinar, 2018
- Edward Jones, Current Tax Issues and Planning Strategies, 2018
- Midwestern Bankruptcy Institute, Tax Reform Impact on Bankruptcy, Panelist, 2018
- 101 Tax Saving Ideas, Co-Author, 1994-1995, 1997, 1999, 2001-2002, 2004, 2006, 2008, 2011