

Courtney Turner

SENIOR TAX ASSOCIATE

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Services

Tax Planning and Preparation

Credentials

Enrolled Agent

Education

University of North Texas,
BS-Accounting

Overview

Courtney is a seasoned tax planning and preparation professional with two decades of years of experience in the financial services industry.

She joined QuadCap in 2024 and works closely with our investment advisors and their clients, crafting customized tax solutions that integrate seamlessly with broader financial goals. Known for her meticulous attention to detail and client-focused approach, Courtney has built a reputation as a trusted tax advisor who consistently delivers results.

Courtney's career began at one of the Big 4 accounting firms, where she developed a strong foundation in tax strategy, compliance, and complex financial reporting. During her tenure, she built a solid foundation in navigating intricate tax codes and regulations, enabling her to deliver high-value solutions to her clients.