

DERICK VAN NESS

Tax & Wealth Strategist | Founder, Big Life Financial

Derick Van Ness is the founder and lead Tax and Wealth Strategist at Big Life Financial. He works with high earning business owners to help them turn strong income into lasting wealth using innovative tax strategy and systematic financial frameworks that predictably build lasting wealth.

SIGNATURE TOPICS

- **Your CPA Is Not Your Strategist:** The difference between tax recording and proactive strategy.
- **Income vs. Wealth:** Why high-earning owners often feel behind and how to bridge the gap.
- **The Danger of "Trapped" Wealth:** Practical ways to build assets outside of your primary business.
- **Tax Planning as an Income Stream:** Shifting from reactive filing to proactive wealth creation.

SUGGESTED INTERVIEW QUESTIONS

- What causes the gap between earning a high income and building real wealth?
- What is the difference between a CPA who files taxes and a strategist who designs outcomes?
- How should high-earning owners rethink traditional advice like 401(k)s and IRAs?
- What does a "Financial Operating System" actually look like for an owner day-to-day?

KEY TALKING POINTS

- **Financial Operating Systems:** Coordinated planning across tax, cash flow, and safeguards.
- **The Income to Wealth Shift:** Moving from active operator to a systematic investor.
- **Return on Emotion (ROE):** Why peace of mind is a more vital metric than ROI alone.

LISTENER CALL TO ACTION

Free 3-Year Tax Review

A no-cost review of past returns to identify missed incentives and structural gaps.

CONTACT & TECHNICAL SPECS

Primary Contact: Derick Van Ness | derick@biglifefinancial.com

Scheduling: Meetme.so/DerickVanNess

Website: BigLifeFinancial.com

LinkedIn: linkedin.com/in/derickvanness/

Tech Setup:

- **Audio:** Beacon Mic (Quiet, dedicated home office)
- **Video:** Razer Kiyo Ultra (4K) | Neewer Softbox Lighting
- **Connectivity:** High-speed Wi-Fi / Hard-wired Ethernet available