Business Tax & Advisory

YEAR-ROUND TAX STRATEGY FOR YOUR BUSINESS

For more than 60 years, SEK has supported businesses and their owners in navigating the complexities of tax and financial management. Whether you're a budding entrepreneur or an established enterprise, we empower you and your business with strategic insights, helping you thrive in today's competitive landscape. Our team understands how continually changing tax laws require your business or personal tax situation to be monitored throughout the year—not just at filing time. SEK's business tax and advisory professionals provide year-round guidance to help you minimize your tax liability and make sound financial decisions.

By partnering with SEK, you gain financial expertise and the freedom to focus on growing your business. Our specialized knowledge of regulations and challenges across various business sizes ensures that both your operations and leadership remain efficient, compliant, and ready for informed decision-making.

BUSINESS TAX COMPLIANCE

We prepare accurate, timely federal and state income tax returns for corporations, partnerships, S-corporations, LLCs, and sole proprietors. Our multi-state tax experience ensures that businesses operating in multiple jurisdictions remain compliant and avoid unnecessary tax exposure.

PROACTIVE TAX PLANNING

Effective tax planning goes far beyond filing your annual return. Our tax advisors work with you throughout the year to identify planning opportunities, evaluate the tax implications of business decisions, and develop strategies that align with your long-term goals.

ENTITY STRUCTURE

Choosing the right business structure can have a significant impact on your tax liability. We help you evaluate the pros and cons of different entity types—from C-corps and S-corps to partnerships and LLCs—and transition to the optimal structure when appropriate.

TAX CREDITS & INCENTIVES

Our team actively identifies federal and state tax credits and incentives that your business may be eligible for, including the Research & Experimentation Tax Credit, the Work Opportunity Tax Credit (WOTC), and various state-level economic development incentives.

SUCCESSION PLANNING

We help business owners develop tax-efficient exit strategies, whether that means transitioning to family members, selling to a third party, or preparing for a merger or acquisition.

TEAM LEADERS

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TAILORED SOLUTIONS FOR YOUR BUSINESS NEEDS

In addition to these services, we also offer a variety of business tax, consulting, financial reporting, and operations management services to meet the unique needs of your business.

TAX SERVICES

- Audit representation before taxing authorities to help you navigate the process with confidence.
- Tax elections and registrations that optimize your business's tax efficiency from the start.
- Estate planning and compliance to ensure your financial future is secure and aligned with your goals.

BUSINESS CONSULTING SERVICES

- Design and implementation of accounting systems for accurate financial tracking.
- Financial planning, forecasts, and projections to inform your business decisions.
- QuickBooks/Sage 50 training and consulting to enhance your accounting software skills.
- Merger & acquisition advisory for navigating complex transactions.
- Employee benefit plan audits to ensure compliance and efficiency.
- Peer reviews that provide insights to improve your business's processes and ensure quality.
- Litigation support to safeguard your interests during legal challenges.

FINANCIAL REPORTING SERVICES

- Bookkeeping and payroll processing, direct deposit, and payroll tax handling
- General ledger maintenance and financial statement preparation to give you a clear picture of your business’s financial health.
- Bank reconciliation that ensures every transaction is accounted for.
- Independent financial audits that confirm the accuracy and integrity of your financial statements.

OPERATIONS MANAGEMENT

- Performance measurement and internal control reviews that enhance operational efficiency.
- Proactive human resources consulting and retirement plan design & administration to support both your team’s growth and satisfaction.

NAVIGATING THE PERSONAL SIDE OF TAXES

As a business owner, between your work responsibilities and the busyness of life, you likely don’t have the time to decipher tax laws. Yet, as you navigate issues with tax implications, such as the impact of state and local taxes, effectively making cash gifts to a child, or how your business income affects your personal return, you need an advisor who can help you make these decisions with confidence.

That's where SEK bridges the gap. Our experienced team—well-versed in the nuances of tax codes—is here to guide you through making informed decisions all year round. We believe that effective tax planning shouldn't just be an annual endeavor, but a part of your ongoing financial strategy.

SEK provides a suite of services to optimize the tax situation for business owners navigating the complexities of both personal and business taxes, including:

- Individual income tax preparation and planning: Expert guidance to ensure compliance while positioning you for maximum savings.
- Multi-state tax considerations: For those with interests across state lines, we develop strategies that account for specific state laws and regulations.
- Personal property tax: Navigating the specifics of personal property tax to ensure you're paying what's due and no more.
- Estate and gift taxes: Strategic planning to manage the implications of estate and gift taxes on your financial legacy.
- Life's milestones tax planning: Tailored tax strategies for major life events, from education and retirement planning to charitable giving.