



Business Tax & Advisory

ALIGNING STRATEGY WITH YOUR BUSINESS AND PERSONAL GOALS

For over 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. By partnering with SEK, you gain more than just financial expertise—you gain 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.

TAILORED SOLUTIONS FOR EVERY BUSINESS NEED

Tax Services

- **Tax planning and preparation:** Maximizing your savings while ensuring compliance.
- **Comprehensive federal, state, and local tax reporting and filings:** Keeping you ahead of deadlines and regulations.
- **Audit representation before taxing authorities:** Navigate the process with confidence.
- **Tax elections and registrations:** Optimizing your business's tax efficiency from the start.
- **Estate planning and compliance:** Ensuring your financial future is secure and aligned with your goals.
- **Research & experimentation tax credits:** Helping businesses benefit from tax savings through innovative processes and product.

Business Consulting Services

- **Business entity selection consulting:** Ensuring the foundation of your business is solid.
- **Design and implementation of accounting systems:** Ensuring accurate financial tracking.
- **Financial planning, forecasts, and projections:** Guiding you to make informed business decisions.
- **QuickBooks/Sage 50 training and consulting:** Enhancing your accounting software skills.
- **Succession planning and business valuations:** Preparing your business for the future.
- **Merger & acquisition advisory:** Navigating through complex transactions.
- **Employee benefit plan audits:** To ensure compliance and efficiency.
- **Peer reviews:** Providing insights to improve your business's processes and ensure quality.
- **Litigation support:** Safeguarding your interests during legal challenges.

Financial Reporting Services

TEAM LEADERS

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- **Payroll processing, direct deposit, and payroll tax handling:** Simplifying your payroll responsibilities.
- **General ledger maintenance and financial statement preparation:** Giving you a clear picture of your business's financial health.
- **Bank reconciliation:** Ensuring every transaction is accounted for.
- **Independent financial audits:** Confirming the accuracy and integrity of your financial statements.

Operations Management

- **Performance measurement and internal control reviews:** Enhancing operational efficiency.
- **Proactive human resources consulting and retirement plan design & administration:** Supporting your team's growth and satisfaction.

NAVIGATING THE PERSONAL SIDE OF TAXES

Taxes are more than just numbers on paper; they reflect your life choices, milestones, and plans. Whether you're navigating the impact of state and local taxes, the implications of a cash gift to a child, or how your business income affects your personal return, life's many decisions carry tax consequences. But who has time to decipher tax laws amidst life's busy moments?

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

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

- **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.

READY TO OPTIMIZE YOUR BUSINESS?

The complexities of owning a business shouldn't overshadow the important moments in your life. Contact us using the form below to discover how we can provide peace of mind, ensuring you're compliant while minimizing your overall tax liability and supporting your financial goals.

Visit www.sek.com for more information or to schedule a consultation today!