

Tax & Compliance

Continually changing state and federal tax laws require your business or personal tax situation to be monitored throughout the year. Continuous tax planning is an important tool for businesses and individuals to minimize their overall tax burden.

WHAT WE OFFER

Business Tax Consulting

In today's business environment, proper tax planning and advice can give your business a competitive advantage. Our consultants provide advice regarding:

- ▶ Federal, state, and local tax return planning, consulting and preparation
- ▶ Entity selection
- ▶ Succession planning
- ▶ Business valuations
- ▶ Representation before taxing authorities
- ▶ Proactive communication of tax law changes
- ▶ Employee benefit plan design, administration, and return preparation
- ▶ Sale, acquisition, merger or liquidation of a business
- ▶ Payroll tax compliance and consulting
- ▶ Multi-state tax compliance
- ▶ Sales & Use tax compliance and consulting

Personal Tax Consulting

Our tax advisors work with you year-round to make sure you take advantage of all available exemptions, credits, and incentives. We focus on the following areas to develop a comprehensive financial plan:

- ▶ Personal income tax planning, consulting, and preparation
- ▶ Multi-state tax compliance
- ▶ Personal property tax compliance
- ▶ Estate and gift tax planning and return preparation
- ▶ Education planning
- ▶ Retirement planning
- ▶ Charitable giving
- ▶ Personal financial statement preparation

HOW OUR CLIENTS BENEFIT

Knowledge to deliver an unmatched level of service

Insight to understand each client's unique circumstances and offer solutions to match

Peace of mind by minimizing our clients' tax liability with accurate and timely processing

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