



HIGH NET WORTH TAX SUPPORT

Effective Planning Strategies

Our high net worth clients include business owners, executives in privately held or publicly traded entities and families who have complex financial and tax considerations. Increased investment activity results in tax filing complexities and also allows for proactive tax planning strategies that require an advisor with experience and expertise.

Create a Tax Plan

We work in coordination with our client's attorneys and financial advisors creating an integrated approach to address issues unique to each client. Our tax planning capabilities include projections to evaluate alternative planning scenarios. We look for proactive ways to minimize tax and to plan for the cash flow required to meet tax obligations.

Generational Tax Support

Estate and gift taxation is the inevitable merging of life's two certainties – death and taxes. We will help you understand the strategies and implications of your estate and gifting plan. We also will help you comply with the sometimes confusing filing requirements and fiduciary responsibilities of estates and trusts.

High Net Worth Tax Support Services Include:

- Tax Planning & Return Preparation
- Personal Financial Statement & Bill Payment
- Family Office Support
- Charitable Giving & Philanthropy Administration
- Estate, Trusts & Gifting Strategies
- Tax Analysis & Projections
- Tax Planning of Retirement Payouts
- Stock Option Strategies
- Divorce & Support Issues
- Tax Services for Family Partnerships & LLCs

Do You Have a Tax Plan?

Let us examine your tax returns and talk to you about your goals and tax planning strategy. We do this at no-cost so we can learn about your needs and you can begin to understand that not all CPAs are the same.

The Next Step

Explore your options. Visit our website to learn more about how we can work together for your success.

