



**Tax Services**

# **INSPIRED TO TAKE THE STRESS OUT OF TAXES**



**What inspires you, inspires us.**





## LESS HASSLE. INCREASED SAVINGS. PEACE OF MIND.

The goal of tax planning is almost as universal as taxes themselves: Keep more of your money in your pocket. How that happens can come in any number of ways, depending on your circumstances—credits, deductions, business structure and more can all be valuable options. But how can you figure out the best strategy to achieve your short and long-term goals? That's when the right advisor can help you the most.

Our experienced, dedicated tax team spends every day solving tax problems, applying and interpreting tax law for people like you so they can minimize tax liability and risk, as well as save for the future. With more control over your taxes, you'll gain peace of mind—and that's something we all owe ourselves.



# WHAT CAN EFFECTIVE TAX PLANNING ACCOMPLISH?

## **Analyze and Implement Strategies**

Use the knowledge and resources of a whole team of tax professionals to model and compare scenarios, then capitalize on the strategic tax opportunities that make sense for your goals.

## **Forecast Outcomes**

Maximize after-tax cash flow and optimize retirement, estate and gift tax planning.

## **Minimize Disruptions**

Ongoing evaluation of your tax plan can prepare you for future taxable events, keeping their impact on your goals at a minimum.

## WHAT WE DO

**Tax Planning & Return Preparation** – Plan for the future and ensure compliance with federal, state and international tax laws.

**State & Local Tax** – Feel confident operating or expanding across state lines, even as an online retailer.

**International Tax** – Take the guesswork out of international tax questions and understand how your decisions affect compliance and profitability.

**Cost Segregation** – If you recently constructed, purchased, repaired or renovated a building, you may be able to accelerate its depreciation and increase your cash flow.

**R&D Tax Incentives** – Research and development credit rules now allow many organizations to meet the necessary criteria simply through their efforts to stay competitive. Be sure you're not missing out.

**Accounting Methods** – Most taxpayers don't understand the importance of determining when and how to report their income and expenses for tax purposes. Could you benefit from a review of your tax accounting methods.

**Pass-Through Entity Consulting** – The tax code and accompanying regulations grant flow-through entities a high degree of flexibility. If you are an S corporation with a disqualified shareholder, have a complicated operating agreement, or want to merge or eliminate a partner, we can help.

**Mergers & Acquisitions** – Ensure a successful transaction and avoid common tax challenges.

**Wealth Transition Services** – Gain peace of mind that your wealth is positioned to effectively accomplish your personal, business and charitable goals, as well establish a plan to care for your family in a way that enhances their lives through our estate, trust and gift tax planning.

**IRS Dispute Resolution and Collections** – Put experience in your corner if the IRS is examining your return, has sent you a collection notice or you're currently navigating a penalty abatement. Our team of controversy experts has more than 50 years of experience working with the IRS.

**Exempt Organization Tax** – Make strategic decisions and ensure you are not operating in a way that could jeopardize your tax-exempt status.

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