

It's not how much you earn, it's how much you **keep**.

TAX PLANNING AND PROJECTIONS

Coordinated support from Tax & Planning to create strategies designed to minimize your taxes over time:

- Tax-aware investing
- Strategies to minimize/offset realized gains
- Tax-free income strategies
- Quantified impact of your planned transactions, such as business sales and executing stock options
- Custom tax-loss harvesting, offsetting taxes on both gains and income
- Impact analysis of tax policy changes
- Tax residence analysis
- Partnership and Trust expertise
- Advanced gifting strategies
- Special circumstance planning, including same-sex / unmarried couples and marriage or divorce

TAX CONTROVERSY

Resolve and respond to correspondence you receive from IRS and state authorities, including:

- State audits
- Inquiries
- Penalty notices

TAX PAYMENTS

Monitor your income, gains and losses throughout the year:

- Evaluation of federal and state withholdings
- Tax projections
- Estimated payment assistance and tracking account activity with the IRS

TAX RETURN PREPARATION

Prepare your individual, trust and family partnership returns:

- Electronic tax organizer
- Filing cabinet with your returns in Vault
- E-file

Your personal CFO advises on your specific situation to ensure planning.

