FAMILIES & HIGH NET-WORTH INDIVIDUALS

New and changing tax laws aimed at the wealthy are continually at the forefront of regulatory debate. Preserving wealth has never been such a challenge as it is now and it is of absolute importance to have a tax specialist on your side to help build, preserve, manage, and transfer your financial legacy.

Our professionals have more than 65 years of assisting clients in managing assets, tax planning, business succession, retirement planning, and estate, trust, and gift tax. We collaborate as a part of your advisory team working in concert with attorneys, financial planners, and other professionals to provide a cohesive strategy to accomplish your goals.

Tax Services

- Income tax return preparation and filing, including multi-state taxes
- Capital asset planning and strategy
- IRS audit support
- Conservation easements
- 1031 exchanges

Accounting Services

- Family office services, including bookkeeping and expenses management
- Payroll processing and filings for staff
- Accounts reconciliation
- Personal financial statements

Consulting Services

- General financial planning, including cash flow management, projections, and budgeting
- Education planning
- Business valuations
- Marriage and divorce issues
- Litigation support
- Receivership
- Business and family succession planning
- Retirement planning
- Estate and trust planning
- Charitable giving structure

Audit & Assurance

- Financial statement audits, reviews, and compilations
- Internal control reviews
- Fraud investigations and risk management
- Agreed-upon procedures

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