

REAL ESTATE DEVELOPMENT AND INVESTMENT



Taxation of real estate is one of the most complex areas of the tax code. Depreciation rules change regularly and an improper set up of asset acquisitions can significantly delay or even lose depreciation deductions. The consequences of good or poor tax planning can make or break a project.

We have more than 65 years of experience in dealing with all aspects of real estate planning and taxation, from setting up a simple rental investment to handling a multi-phase, multi-entity, multi-year, and multi-million-dollar real estate development.

Tax Services

- Income tax return preparation and filing, including multi-state taxes
- Like kind (1031) exchange
- Capital asset planning and strategy
- Investor/developer strategy
- Cost segregation studies
- Depreciation schedules, including depreciation options and elections
- Tax planning
- IRS audit support

Accounting Services

- Bookkeeping services and consulting
- Payroll processing and filings
- Financial statements, reporting, and management reports
- QuickBooks set-up, training, and consulting

Consulting Services

- Business planning, financial projections, and budgets
- Business valuations
- Selling, exchanging, and/or developing real estate
- Entity set-up and organizational structure
- Cash flow management
- Project benefits, including development of assets list and project indirect costs allocation
- CFO services
- Litigation support

Audit & Assurance

- Financial statement audits, reviews, and compilations
- Financial statements for bonding or governmental contract purposes
- Operational audits
- Internal control reviews
- Employee benefit plan audits
- Fraud investigations and risk management
- Agreed-upon procedures



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