

In addition to our consultative and valuation services, we offer a full range of accounting and tax services to closely-held business and high-net worth individuals that are tailored to suit your unique needs. We also represent our clients in income tax and sales tax audits, and will work with you to ensure that process is as painless as possible.

## TAX COMPLIANCE

As a full-service financial consulting and accounting firm, we provide tax compliance services for all types of tax returns. Income tax compliance includes individual, corporation, S corporation, partnership, employee benefit plans, trusts, etc. We also provide sales tax and payroll tax compliance services. We provide tax compliance services with the business planning perspective needed to identify future planning opportunities.

## INCOME TAX PLANNING

Income taxes can significantly impact your business's profitability as well as your personal net-worth, and therefore strategies must be implemented to minimize your tax liability. We will learn all we can about your business and your income sources in order to implement your business and individual financial strategies in the most tax-efficient manner.

## ESTATE PLANNING

Planning for the next generation can be a complicated process. Each situation is different, and we will get to know you, your business, and your estate planning professionals in order to provide accurate and meaningful analysis of your estate plan.

## FINANCIAL STATEMENTS PREPARATION

Timely and accurate financial reporting is necessary in a business owner's decision making process. We will compile the financial statements required by management. If lenders and/or investors require a review or audit, we will coordinate with management and our network of attest firms to meet these requirements efficiently.