Tax Strategy and Advice

For international clients, business owners or executives, and individuals or families with complex financial situations, investments, and tax filing requirements, our tax strategy and advisory services help to minimize tax liabilities and maximize cash flow.

Working closely with each client we develop and implement strategies which offset the tax implications resulting from complex compensation plans, foreign holdings, investments, estates, gifting plans, trusts and other assets that involve complicated fiduciary responsibilities and filing requirements.

Our work often includes coordination with our client's financial advisors and attorney to align the work of these professionals to our firm's portfolio of tax strategy, advisory and preparation services.

Via the following array of services our clients are able to proactively plan for the future, leverage current tax incentives, defer income if possible and ensure that all tax returns and related documents are accurately prepared and filed:

- Strategic tax advisory, preparation and filing
- Tax services for family partnerships and LLCs
- Personal financial statement preparation
- Estate, trusts and gifting strategies
- Tax planning of retirement payouts
- Inheritance tax planning and preparation services
- Tax analysis and projections
- Stock option strategies
- Life change support
- Reporting of foreign assets and financial accounts
- Reporting of foreign entities and subsidiaries
- Consolidation of financial statements
- Reporting of foreign income
- Foreign tax credits
- International tax treaties
- US exit tax

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