



Tax Compliance, Financial Planning & Audit Representation

The key to successful tax and financial planning is working with an experienced and proactive tax accounting team. We are experts in business, individual, trust and estate and international tax compliance, and our team understands that the greatest value we provide is taking the time to listen to our clients and make sure our plan incorporates business financial goals as well as personal financial plans. During your tax service with our firm you can expect:



- Upfront pricing with no surprise fees
- Timely, pre-scheduled work so you can rely on your requested due dates
- Review meetings or phone calls scheduled at the beginning or end of tax preparation according to your needs
- Current tax questions answered
- Summary of your current tax year and advice for the upcoming year
- Quality review prior to final filing to check for accuracy
- Follow up with tax planning needs identified during preparation

Partnering with our firm to properly report your individual income tax and business information will verify that your reporting is consistent and accurate. We ensure that valuable carryover capital losses, unused charitable contributions, foreign tax credits or passive activity losses are never lost or overlooked. We can see the bigger picture and form a plan far beyond the scope of a tax software application.

Family Financial & Tax Planning – Our clients have an experienced team of CPAs working with attorneys, financial advisors and insurance experts to provide a holistic approach and plan. Many clients have come to rely on tax compliance time to revisit all of the plans that have been implemented or need to be implemented. Our goal is to make sure that we touch on these needs so that too much time doesn't go by. Our experience, education and constant training help us to identify when our clients need to be introduced or reminded of important financial and tax planning stages in their life.



Partner with us and you will see, the tax savings opportunities we find and peace of mind we provide our clients, far outweigh the costs of the service.

Tax Audit Representation – We specialize in IRS and state audits of business tax returns, individual income tax returns and sales tax accounts. Our firm has successfully represented hundreds of business and individual clients by understanding their rights and how to work with IRS programs to mitigate potential tax bills. Proper tax audit representation will save you or your business precious time and provide invaluable peace of mind.

