Individual Tax Preparation & Planning

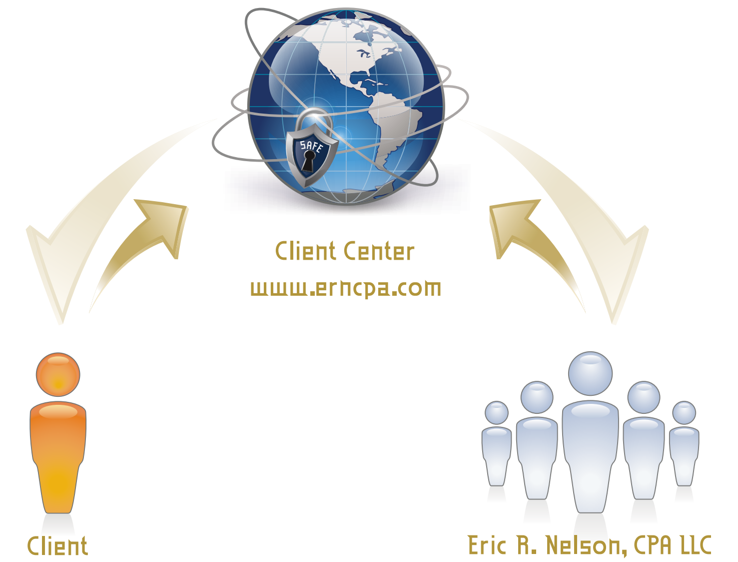
FACT SHEET

What We Offer

You want a professional handling your taxes to help you remain on a healthy financial path. Our comprehensive tax preparation and tax planning services focus on your need for sound, expert tax support.

Our experienced professionals excel at tax preparation for individuals. Whether it's multistate tax preparation, IRS representation, or wealth planning, our firm will handle it with expertise and precision. We also understand the necessity of planning a sound tax strategy to mitigate your tax burden. Our tax planning service provides you with a dedicated partner. We work with you at year end to develop a personalized plan with tax-saving strategies that are tailored to your unique situation.

We want to earn the right to be your trusted tax partner.



- Scan & upload documents

- Prepare returns
- Plan your tax strategy
- Provide ongoing advice

The Convenience of Our Online Platform

Our Client Center enables you to exchange documents with our staff in real time via the web and provide a direct link to us—24/7

The Value of Our Service

- **Offers peace of mind**—know that your trusted, experienced advisor is accessible to answer questions and help plan a proper tax strategy to meet your unique needs.
- **Provides personal, one-on-one service and guidance**—we offer answers to your important tax-related questions in language you understand.
- **Offers the convenience of an online, paperless process**—you can submit your tax source documents online and access your completed return instantly in your secure portal.
- **Ensures security of data**—exchanging documents within our online platform is more secure than sending documents via email.

FACT SHEET Tax Preparation & Planning - Individual

Our Comprehensive Individual Tax Services

Our mission is clear: To earn our place as your financial advocate. To accomplish this, we provide service that extends well beyond basic delivery of tax documents. We work in partnership with you to make sure you understand your data and are well-informed. Consider all we can do for you:

- **Multi-state tax return preparation**—we remain current on state-specific tax laws to ensure your multi-state return is prepared accurately.
- **Quarterly estimate tax calculations**—by supplying you with quarterly calculations, we can help you come up with a strategy to mitigate your tax burden...so there are no surprises on April 15.
- **Year-end tax planning**—we meet with you at year end to explain your data, so you can make sound decisions to reduce your tax liability.
- **Wealth transfer planning**—we ensure that you are informed about annual exclusions for gift tax purposes, including timing of gifts and tax rate.
- **Estate, gift, and trust preparation**—our effective planning services ensure that you have a sound wealth transfer strategy in place, enabling you to minimize the impact of taxes.
- **IRS audit assistance**—should you receive an audit notice, our firm will represent you in front of the IRS.
- **Qualified retirement plan consulting**—ensures that you are investing your money wisely in preparation for retirement. We identify qualified plan types, such as 401K and SEP, as well as keep you informed of due dates and contribution limits.

"It's tax preparation and planning by seasoned experts whose main goal is to assist you in planning for long-term financial wellbeing and success."

CONTACT US TODAY

For more information on Individual Tax Preparation and Planning, or other services, please contact our firm. We are happy to discuss how we can help you meet your financial goals.

Call or click today for your complimentary appointment.

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