

Tax Compliance & Consulting

Experience

Our depth of experience and extensive library holdings ensure that clients are given every advantage when complying with tax law. Clients are represented before tax agencies with tax expertise and judicious reasoning. The client listing includes individuals, partnerships, corporations, S corporations, fiduciary, exempt organizations, estates, and trusts.

Individuals, Partnerships, Corporations, & Exempt Organizations

Our seasoned professionals are well-versed in tax effects, personal financial planning, estate planning, and tax savings opportunities. We can help clients make informed decisions about present and future tax solutions. We can also assist with multi-state tax planning. We will work to assure that all tax issues and concerns are addressed. We will provide consulting, compliance, procedure review and analysis, and information outsourcing. We will assist you in preparing a request for exemption or selecting the tax-exempt entity for your group or organization.

Economic Development Opportunities

We have experience with the management of economic development incentives. Our partners have assisted several international companies, by providing advice on available incentives, assistance in location and site selection evaluation, cash-flow analysis to incorporate tax incentives offered, negotiation of incentives with state agencies, and compliance monitoring required by economic development incentive agreements. As participating members of the local development councils, we stay abreast of current economic development opportunities.

Qualified Intermediary

Internal Revenue Code section 1031 allows taxpayers to defer income tax, if real property is exchanged rather than sold. However, finding another person to make a direct trade can take a considerable amount of time. Use of a qualified intermediary allows you to sell your property and buy replacement property; and you can reinvest all of the sale proceeds because you pay no income tax on the transaction. The rules surrounding delayed exchanges are extremely complex with no room for error. It is imperative, therefore, to depend on knowledgeable and experienced professionals.

