



## TAX SERVICES AND PLANNING

### Proactive Tax Planning for Businesses and Individuals

In this fast-paced, ever-changing business environment, the last thing you want to worry about is your tax responsibility. One of the best ways to manage tax issues is to plan for them. At KatzAbosch, our tax expertise begins with a thorough understanding of the many complexities that affect your tax situation. And, as the laws continue to change, we stay informed and updated, bringing you the most accurate, informed guidance and strategy.

Our tax advisors and specialists are experts in federal, state and local tax issues related to taxation of:

- Individuals
- C&S Corporations
- Partnerships and Limited Liability Companies (LLC)
- Expatriate/Nonresident Aliens
- Foreign Companies doing business in the U.S.
- U.S. Companies doing business overseas
- Gifts, Estates and Trusts

What sets us apart from others is our focus on education. Your tax obligation should never be unexpected. We teach clients what to look for from a tax perspective. We're here throughout the year—not just at tax season—to help clients grow their business and surpass their goals.

In the event of an audit, we handle the entire process, providing complete documentation, meeting with auditors and keeping interruption to your business at a minimum.

Our full range of services includes:

- Preparation of compiled, reviewed, or audited financial

statements

- Preparation of all practice federal, state, local and personal tax returns
- Individual and business federal income tax planning services designed to minimize income taxes
- Tax planning and entity planning for setting up new businesses
- Tax consequences analysis and planning for sale of a business, mergers and acquisitions
- Shareholder buy/sell agreements planning
- Planning for business succession and related tax issues
- Preparation of annual trust accounting
- Business valuation services and dispute resolution
- Tax planning and return preparation of expatriate/nonresident alien income tax returns
- Tax planning and compliance services for foreign companies doing business in the U.S. and U.S. companies doing business overseas
- Estate, trust and gift tax planning, return preparation and administration
- Cost segregation studies
- Pension/retirement planning
- Elder care services

In addition, KatzAbosch was a founding firm of the Leading Edge Alliance (LEA), a global alliance of major independently owned accounting and consulting firms in the United States, Asia, and Europe.

**For more information, contact us at 1.800.989.6432 or [info@KatzAbosch.com](mailto:info@KatzAbosch.com).**

*The KatzAbosch team is dedicated to providing responsive, accurate and reliable service to clients. We recently conducted an independent client satisfaction survey and across the board, the firm overwhelmingly exceeds our clients' expectations by more than 90%. Additionally, out of 150 accounting firms across the nation, KatzAbosch averaged 5 to 26% higher than the median group. These excellent results showcase the firm's superior reputation in the mid-Atlantic community and beyond as well as our commitment to helping our clients achieve their financial goals.*