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Individual Services

SERVING YOU

DRIVEN BY THE PEOPLE WE SERVE

As your personal wealth grows, so does the complexity of your financial and tax obligations. This adds importance to planning ahead and developing comprehensive strategies that achieve your short- and long-term financial goals.

That's why we advise business owners, executives and other high net-worth individuals and families on effective tax planning, wealth transfer strategies and other sophisticated financial transactions. Our objective is to minimize your tax payments, preserve wealth and achieve your long-term goals. We help:

- Advise on and implement wealth transfer strategies, including estate and charitable planning
- Advise on retirement planning strategies
- Plan for your children's and grandchildren's educations
- Provide income tax compliance and planning for federal, state and local and international taxes
- Conduct due diligence and advise on real estate and other financial transactions
- Represent you before the IRS and state and local tax agencies
- Assist with bill paying and accounting needs

WHY EDELSTEIN?

For over 50 years, high net-worth individuals and families throughout New England and beyond have relied on Edelstein as their trusted financial and accounting advisors. We help you plan for and manage your tax and financial obligations so you can focus on what matters most to you — growing your business and providing for your family.

Our team approach, focus on personal and business goals and breadth of experience in audit, accounting and tax all add up to peace of mind and the confidence it takes to secure your future.

To learn more about how we can help, contact **Scott Kaplowitch** or **Mike Antonelli** at 617-227-6161.

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