



Tax Services

BEYOND THE NUMBERS

Virtually every investment and financial decision you make – business and personal – has tax implications. These significantly impact your choices and ability to achieve your goals. Year-round tax planning and management are prudent parts of successful business and personal wealth management.

Professional expertise. Personal touch.

Our Tax Team advises privately held businesses and their owners, as well as high-net worth individuals and families, on tax strategies that achieve their goals and minimize tax liability. We provide comprehensive tax planning and analysis to facilitate sound decision-making and to ensure that there is an effective plan to maximize cash flow. We also manage the reporting and filing of state, local, federal and international tax forms to ensure compliance.

As your business and personal wealth grows, so does the complexity of tax reporting and planning. Our tax experts analyze the tax consequences of your financial transactions to guide your decision-making and planning, provide alternatives to minimize your tax liability, and handle tax reporting to ensure compliance.

We provide:

- Business tax planning for federal, state and local and international taxes
- Individual and family tax planning for federal, state and local and international taxes
- Wealth transfer and estate planning, including gifting and charitable planning
- Due diligence for business transactions, including merger & acquisition, purchases and sales, financing, and more
- Succession planning for businesses
- Representation before the IRS and other tax agencies

WHY EDELSTEIN?

Our Tax Advisors help manage your tax 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 add up to peace of mind and the confidence to achieve your goals.

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

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