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accounting for you

Individual Taxes

MAKE A FINANCIAL STATEMENT

Good planning is essential to minimize your tax liability, ensure compliance and achieve your goals, particularly in an environment of increased enforcement and changing regulations. We advise business owners, executives and high-net worth individuals and families on effective tax and wealth transfer strategies, so you can minimize tax payments, preserve wealth and achieve your goals.

- Advise on and implement wealth transfer strategies (estate planning)
- Provide income tax compliance and planning for federal, state and local, and international taxes
- Conduct due diligence on real estate and other financial transactions
- Represent before IRS and state and local tax agencies
- Advise on retirement planning strategies
- Implement cash management techniques that fit your objectives
- Work to maximize cash flow to create financial flexibility

As your 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.

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

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