High Net Worth Individuals and Family Offices

SERVICES

Audit

Business Management & Family Office

Gift & Estate Tax Valuations

Mergers & Acquisitions

Tax

Treehouse: Partnership Tax Compliance & Reporting

Valuation Advisory Services

PROFESSIONALS

Sherry Amin

Cameron Burkert

James S. Carlin

Michele Carter

Jane Chang

Kevin Chapman

Cindy A. Cooper

Sarah Cullen

Garrett Cushing

David Day

Jeffrey Desgroseilliers

Matthew Diesenbruch

Mike Dreyer

Michael Duong

Eniko Earley

Asset protection and value preservation—objectives of high net worth individuals and families. You worked hard to accumulate your wealth, but face the challenges of understanding how best to protect what you have worked so hard to achieve. Navigating the increasingly complex tax environment, structuring asset holdings and transactions, making sure assets are protected and appropriately insured, passing on your legacy, giving to causes that are important to you, are just some of the challenges you face. Our tax, business management, and audit teams understand the issues and risks that impact you and your assets. We provide services that are integrated and aligned with your goals. We work together to address the complexity in your life.

Individual tax planning and compliance

Tax planning is not a *once a year* activity. We believe that tax planning occurs real time and year round. When changes occur within your asset holdings, we evaluate the tax implications in its entirety—to you, your business, your investments, your real estate holdings, your estate and your overall financial objectives. We work with individuals and family offices that hold foreign assets and assist in structuring and complying with new regulatory requirements. More than providing tax returns, we provide guidance and insight to help you achieve your goals.

Family Office and Business Management

Our Business Management team helps protect assets and preserve value by providing a concierge approach to client service—tailored to your unique needs. We understand that individuals and family offices with complex asset holdings require more than just bill paying services, they require an integrated team to help plan and execute long-term goals. Often viewed as your gatekeeper, we help to make complex transactions less complicated. Working with high profile clients, we understand the importance of confidentiality and trust. Our track record of growth validates the skills and experience of our team.

Joe Fernandez
Jessica Fine
Tom Firestone
Jason A. Flashberg
John Frick
Kenneth R. Froelich
Curt Giles
Charlene W. Greene
Hans Gustafsson
Jodie Hanano
Sonny Heshmati
Mara Hofman
Philip J. Holthouse
Greggory J Hutchins
Dennis Ito
Cathy Kleineahlbrandt
Evelyn Kuo
John R. Lilly
Perchui Manasarian
Julie C. Miller
David Nowak
Patricia J. O'Connell
Rosalinda V. Oasay
Robin Paule
Keith Pritchard
John Samtoy
Inessa Sarkisyan
Jessica Schwalb
Felix Shapiro
Benjamin H. Shiao
Jonathan Siao
Lisa Sica
Amanda Slavin

Legacy Planning

A lifetime of accomplishments. Family. Legacy. How to transfer wealth is one of the more challenging issues facing individuals and families. Our Wealth Transfer team assists in providing guidance in the establishment of trusts, estate planning, charitable giving and gifting.

Advisory

Deciding to sell a business you have spent a lifetime building is one of the most difficult decisions facing entrepreneurs. How to optimize value, how to best structure the transaction, how to plan for the tax ramifications, how to plan for succession are all issues that must be addressed. Our M & A team helps you to navigate these complexities.

Tax Alerts

President Trump signs the Consolidated Appropriations Act, 2021 that includes $900 Billion for COVID-19 Relief, including Tax and Paycheck Protection Program Provisions
December 29, 2020

Are Rates Going Up? Biden's Tax Reform Proposal Unpacked
December 8, 2020

2020-2021 Tax Planning Guide
November 9, 2020

IRS Postpones Filing and Payment Deadlines for Gift and Generation Skipping Transfer Tax (GST) Returns from April 15, 2020, to July 15, 2020
March 30, 2020

IRS and California Postpone Filing and Payment Deadline
March 22, 2020

IRS Postpones April 15 Tax Payment Deadline to July 15 and California FTB Announces Postponement of Filing and Payment Deadlines
March 19, 2020

IRS Delays April 15 Tax Payment Deadline by 90 Days for Millions
March 17, 2020

Norman J. Tamkin
Sarah Tewner
Andy Torosyan
Eckhard Walter
Stephanie Wilkinson
Stacy Yamanishi

Supreme Court Case – North Carolina Department of Revenue v. Kimberly Rice Kaestner 1992 Family Trust
June 28, 2019

Welcome News for Wealthy California Residents
June 10, 2019

IRS Audits This Year are Bad News for the Rich
February 28, 2017

Resources

COVID-19 Resources for Californians

COVID-19 Resources for Texas Residents and Businesses

COVID-19 Resources for Arizona Residents and Businesses