HOLTHOUSE | CARLIN | VAN TRIGT LLP

Tax Planning & Compliance

RELATED SERVICES

Audit

Mergers & Acquisitions

Tax

PROFESSIONALS

Iris Aleman

Trevor Anderson

Jenni Elder

Annette Hovsepian

Jonathan Hrzina

Valerie Kasper

Ada Lee

Anita S. Lee

Ryan Mark

Ana Petrosyan

Rebecca Wexelman-Moss

Melinda Zhang

Getting on and staying on the right track when it comes to tax planning and compliance is difficult at best. Our team of specialized tax practitioners can address the most complex tax planning and compliance needs of high net worth individuals and business owners because of our understanding of sophisticated partnership structures, complicated holdings of high net worth individuals, and complex corporate structures. We do not view tax planning as a once a year activity but a year-round approach that addresses changes as they occur, so planning opportunities are identified to achieve tax savings. Our goal is to provide you more than a tax return; our goal is to provide guidance that will help you mitigate risk and planning ideas to help you achieve your financial goals.

Our planning and compliance services include, but are not limited to:

- Individual, partnership, and corporate tax planning and compliance services, including tax planning considerations resulting from the Tax Cuts and Jobs Act and CARES Act.
- Individual, partnership, corporate, trust, estate, gift tax return preparation
- Integrated planning for closely-held businesses, individual, family, estate, trust
- Evaluation of entity structure
- Evaluation and implementation of appropriate tax accounting methods
- Implementation of credits and incentives
- Analysis of international activities
- Analysis of state and local tax issues