



PROFESSIONAL ATHLETES & ENTERTAINERS

At WilkinGuttenplan, our dedicated team of experts helps our professional sports and entertainment clients manage their financial affairs both personally and professionally. We will work with clients to develop immediate and long-term financial and tax strategies and create a detailed plan for the future. Throughout the entire process, maximizing their wealth and minimizing taxes is our main focus. We want to help them sustain the lifestyle they desire for many years after their careers have peaked.

Our areas of expertise include tax planning and preparation, budgeting, forecasting, accounts payable, and other concierge/family office accounting services.

WEALTH MANAGEMENT / TAX PLANNING, PREPARATION AND COMPLIANCE

Our wealth management and tax planning process is extensive and starts by reviewing anticipated earnings and long-term cash projections. We discuss financial goals with clients and then work with their financial team to implement strategies to increase wealth while minimizing tax liability. Having prepared over 1000 tax returns for athletes and entertainers, we are familiar with multi-state and international taxation and any applicable deductions.

OUR SERVICES INCLUDE:

- Preparation of federal, state and local income tax returns
- Planning and implementation of tax minimization strategies
- State residency planning
- Teaming up with your investment advisors to have a coordinated plan
- Philanthropic planning and execution
- Estate and trust planning
- Charitable giving strategies
- Concierge/Family Office Services

In addition, at WilkinGuttenplan we have a suite of concierge/family office services designed to significantly reduce stress in our clients' lives while ensuring their financial security.

CONCIERGE/FAMILY OFFICE SERVICES WE PROVIDE INCLUDE:

- Maintenance of bank accounts
- Bill payment services
- Personal recordkeeping
- Cash flow management
- Create/implement monthly budgets and accounting reports
- Produce forecasted cash flow statements
- Assistance in achieving financial objectives and goals