



At WilkinGuttenplan, we recognize that there is a difference between filing tax returns and employing tax planning strategies. Our goal is to help our clients minimize taxes while maximizing earnings. While we provide expert tax return preparation, our dedicated tax team offers strategic consulting to help you navigate complex tax issues, optimize your tax strategy and achieve your financial goals. With a focus on precision, personalized advice, and exceptional service, we are committed to supporting your financial health and success.

Our staff keeps up to date on any new tax laws through our continuing professional education. We communicate these changes to our clients through tax alerts that explain how these changes will affect them.

We also recognize that the timing of tax payments can have a crucial impact on cash flow and work closely with our clients so that tax payments, to the extent possible, can be budgeted in advance. The best tax strategy can be muted if the tax payment comes as a surprise.

SERVICE OFFERINGS

“Formation to Sale” Business Tax Planning:

- Business purchase assistance including due diligence services
- Selection of business entity
- Compensation planning for key employees
- Retirement planning
- Buy/sell agreements
- Planning for business sales
- Transition to the next generation

Individual Tax Planning:

- Tax planning to minimize Alternative Minimum Tax
- Charitable giving strategies
- Stock option compensation planning
- Retirement plan tax considerations
- Complete U.S. tax coordination for foreign businesses
- Operating in the United States
- Tax planning and compliance for U.S. investment in Foreign countries
- Tax equalization programs for employers sending executives overseas

Tax Returns:

- Preparation of all business and individual tax returns
- Taxpayer advocacy at federal and state tax examinations

State Tax Services:

- Nexus studies to determine state and local tax liability
- Preparation of Voluntary Disclosure Agreement
- Applications and negotiations with state taxing authorities
- Sales tax consulting