



TAX PLANNING & COMPLIANCE

You Can't Avoid Paying Taxes, But You Can Avoid Overpaying

Scheduling a lunch meeting once a year isn't our idea of client interaction. We believe in frequent communications throughout the year and look forward to being engaged by our clients in the regular course of business. **The key to minimizing taxes and avoiding penalties is planning.** Not your average, everyday kind of planning, but planning with knowledge and foresight in mind. **Knowing how the tax laws apply to you or your business** is just the beginning; equally important is having a **clear vision of your goals and objectives.** This coordination of tax knowledge and objectives can open the door to new opportunities and creative strategies. We understand the importance of **tax planning throughout the year and, particularly, at year end.** By taking a proactive approach, you can expect us to communicate early and often so that you don't have any surprises when your tax deadline arrives. It is our ultimate goal to understand your business and enable you to focus on what is important to you while having **peace of mind that your compliance matters are handled with expertise and integrity.**





How Do We Serve **Clients Like You?**

Provide updated information on regulatory and tax law changes

Representation on audits with the IRS or state and local jurisdictions

Consultation with mergers, buyouts, acquisitions, gifting and retirement

Tangible property regulations analysis, implementation, and compliance

ACA analysis and consulting

Services We Provide

INDIVIDUALS



CORPORATIONS



PARTNERSHIPS



**STATE & LOCAL
TAX CONSULTING**



PROACTIVE PLANNING

Our team is able to review your income, expenses, and potential tax liability during the year, with an emphasis on year-end tax planning to provide you with insight needed to minimize taxes and avoid penalties.

We stay informed and keep you updated on the current nuances of the U.S. tax system so you can spend more time running your business or life and less time worrying about the latest tax opportunities.

Professional Relationships

- Alabama Society of CPAs (ASCPA)
- American Institute of CPAs (AICPA)
- BDO Alliance USA

DID YOU KNOW?

Two of our partners previously worked for the Internal Revenue Service, giving our team clear insight and training into the complexity of the IRS taxation system.