

Tax Wrap-Up Meeting

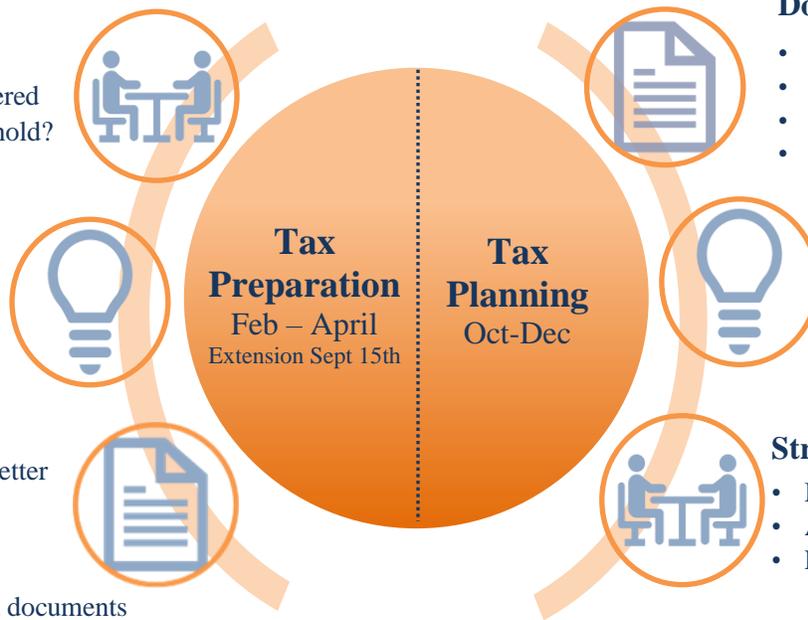
- Discuss finalized returns
- Questions asked & answered
- What does the new year hold?

Tax Return Prep

Using documents provided by client our team will prepare the business tax returns. Last step is preparing the individual return.

Documents

- Business Engagement letter (early December)
- Business Checklist (early January)
- Client uploads required documents



Documents

- YTD Business Results
- YTD Pay Stub (you & spouse)
- Estimate of other income
- Any material life changes?

Accountants Work-Up

Once firm received the above documents our team will work up a projection and mock-up owners individual return

Strategy Meeting

- Meeting to discuss and plan strategy
- Action Items
- Follow up correspondence

Our Advantaged Approach to Tax Planning & Compliance

At the crux of your financial vitality is strategically minimizing your tax burden and preserving capital for both your business and family. With a collaborative, long-term approach to tax planning, SPM&Co partners with clients to help them achieve this aim – we go beyond basic tax planning and preparation of tax returns and help our clients put into play strategies that extract the most value for their business and support the growth and preservation of their personal wealth.

This process is fundamental to good business operations, it is the foundation from which growth opportunities and wealth building can begin. Increased cash flow, retirement and college funding, capital investment, acquisition opportunities, better understanding of your “numbers” and what drives income and cash flow, and tax efficiency are all outcomes of this process. Further, our process ensures no surprises for our clients!

Businesses file tax returns because they must, not because they want to – famously, Judge Learned Hand put it best:

“Anyone may arrange his affairs so that his taxes shall be as low as possible; he is not bound to choose that pattern which best pays the treasury. This is not even a patriotic duty to increase one’s taxes. Over and over again the Courts have said that there is nothing sinister in so arranging affairs as to keep taxes as low as possible. Everyone does it, rich and poor alike and all do right, for nobody owes any public duty to pay more than the law demands.”

~ Judge Learned Hand, *Helvering v. Gregory*, 69 F.2d 809 (2d Cir. 1934), *aff’d* 293 U.S. 465 (1935)