

# SERVICES HIGHLIGHTS

## COMMERCIAL

### Tax &

#### Accounting

- Financial Statements
- Commercial Tax Returns
- Owners' Tax Returns
- GAAP Reports
- Foreign Transactions
- M & A

### Tax Planning

- Tax Reform
- Plans and Projections
- Transaction Structuring
- Executive Compensation
- Business Abroad
- Startups
- Incentives
- R & D Credit
- M & A
- Ownership Agreements

### Fresh Look

- Tax Reform
- Tax Platform Effectiveness
- Choice of Entity
- Tax Check-up
- Methods of Accounting
- Revenue Recognition
- Succession Planning
- Foreign Jurisdictions

## HIGH NET WORTH

### Tax Returns

- Complex Individual Tax
- Trust Tax
- Gift Tax
- Estate Tax
- Foundations
- Foreign Trusts
- Foreign Transactions
- Foreign Reporting
- Agriculture
- Expatriates
- Non Residents

### Tax Planning

- Tax Reform
- Plans and Projections
- Transaction Structuring
- Business Succession
- Multi State Jurisdiction
- Efficient Charitable Giving
- Estate Planning
- Family Transfers

### Wealth

#### Administration

- Trust Fiduciary
- Executive Assistance
- Administrative Requirements
- Fiduciary Accounting
- Foundation Accounting

## TRANSACTIONS

### Business M & A

- Third party referral
- Intermediary
- Positioning
- Valuation Feasibility
- Structuring
- Tax Aspects
- Quality of Earnings
- Tax Diligence
- Close and post-close

### Financing

- Third party referral
- Intermediary
- Positioning
- Credit Request
- Structuring
- Tax Aspects
- Diligence
- Close and post-close
- Leasing

### Real Estate

- Third party referral
- Intermediary
- Positioning
- Valuation Feasibility
- Structuring
- Tax Aspects
- Diligence
- Close and post-close

### Fed/State Tax Matters

- Correspondence Disputes
- Representation
- Examinations
- Appeal Team
- Reasonable Cause
- Accounting Method Changes
- Advance Consents

### Voluntary Disclosures

- Delinquent Filer
- Streamlined Domestic
- Streamlined Foreign
- OVDP Referral
- State VDA's for Non Filing



**DiLorenzo & Company**  
Certified Public Accountants