

SERVICES HIGHLIGHTS

COMMERCIAL

Tax &

Accounting

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

Tax Planning

- Tax Reform
- Plans and Projections
- Transaction Structuring
- Executive Compensation
- Covid Relief
- 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
- Covid Relief

HIGH NET WORTH

Tax Returns

- Complex Individual Tax
- Trust Tax
- Gift Tax
- Estate Tax
- Foundations
- Real Estate Transactions
- Business Acquisition
- Business Sale
- Multi State
- Agriculture

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
- 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

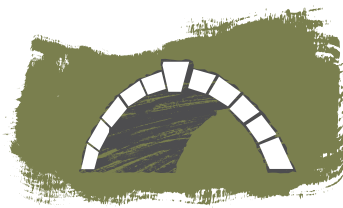
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TAX DISPUTES

Federal/State Tax

Matters

- Correspondence Disputes
- Representation
- Examinations
- Appeal Team
- Reasonable Cause
- Accounting Method Changes
- Advance Consents
- State VDA's for Non Filing



DiLorenzo & Company
Certified Public Accountants