CORIENT TAX SERVICES

Taxes can eat away at your wealth. Our team of tax specialists develop and implement comprehensive income and estate/gift tax strategies designed to minimize tax liabilities while ensuring compliance with ever-changing regulations. Our team of 20+ tax professionals, including CPAs and tax attorneys[1], aims to deliver sophisticated, tax-advantaged strategies within a boutique setting.

Financial and Project Management

Our goal is to minimize your tax burden while seeking to enhance your income and investment returns, so the investment decisions we make proactively take into account any potential tax implications for you. We customize our tax advice and take an integrated approach—working with your family office and other financial or tax experts—to help ensure that all aspects of your financial life are working together to help you grow and sustain your wealth.

Tax Advisory

Multigenerational & Wealth Transfer Planning

- Conduct multigenerational planning, establishing efficient wealth transfer structures that take into account liquidity needs, taxes, and financial stability
- Develop strategies to support wealth preservation, transfer of assets, and minimization of federal, state, income, and estate tax

Governance Advisory

- Advise on governance, including trust holdings, to enhance distributions and minimize taxes
- Assist with developing sustainable governance structures and identifying appropriate professionals to serve

Philanthropic Advisory

- Develop charitable giving strategies to support intent as well as improve benefits during lifetime and at death
- Develop metrics to measure the impact of giving

[1]Our tax attorneys do not provide legal advice.

Tax Compliance

Tax-Advantaged Structure & Planning

- Develop optimal tax structures in order to comply with regulatory, tax, and planning goals and objectives
- Examine federal tax law changes and case law

Tax Returns & Positions

- Manage compliance for all tax returns, ensuring alignment with the original intent, structure, and format of all transactions
- Document tax positions

Quarterly Tax Projections

- Prepare quarterly tax projections in order to calculate estimated tax and support ongoing planning

Audit Defense & Ongoing Support

- Provide ongoing support and audit defense for Federal and multi-state jurisdictions as needed
- Improve U.S., global, and state jurisdictional taxes

For more information on our Tax Planning and Compliance Services, please contact your Corient Wealth Advisor.