



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 attorneys¹, 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

¹Our 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.

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Different types of investments involve degrees of risk, including the loss of principal. The future performance of any investment or wealth management strategy, including those recommended by us, may not be profitable or suitable or prove successful. Past performance is not indicative of future results. One cannot invest directly in an index or benchmark, and those do not reflect the deduction of various fees that would diminish results. Any index or benchmark performance figures are for comparison purposes only, and client account holdings will not directly correspond to any such data.

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Corient Tax LLC can provide standalone tax planning for individuals and businesses, as well as, audit support, under a separate agreement. Corient Tax LLC is not an RIA, law firm or accounting firm and does not provide investment, legal or accounting advice or services. Clients may be charged a separate fee for these additional services.

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Our clients must, in writing, advise us of personal, financial, or investment objective changes and any restrictions desired on our services so that we may re-evaluate any previous recommendations and adjust our advisory services as needed. For current clients, please advise us immediately if you are not receiving monthly account statements from your custodian. We encourage you to compare your custodial statements to any information we provide to you. 4578150-June 2025.