

TAX SERVICES



For Businesses and High Net Worth Individuals

For more than 60 years, S.D. Daniels & Co., P.C. ("SDDco-PC"), the founding entity of the SDDco Group, has provided tax compliance and advisory services for businesses and high net worth individuals. Our tax professionals are committed to helping companies and individuals manage their tax obligations in the face of ever changing legislation.





For Businesses

Our tax professionals take an active role in assisting firms like you to employ tax strategies that meet your business goals and fulfill your tax obligations. To maximize profit and minimize risk, it is essential to integrate tax planning and compliance with business structuring and management.

When guiding our clients, we consider all of your issues and goals when servicing your tax needs. Our clients include: broker-dealers, investment banks, investment advisors, private equity funds, manufacturing, real estate, and tax exempt organizations. Our tax team and SDDco accounting and consultants have decades of experience working together to make sure your firm satisfies the IRS while complying with SEC industry rules and regulations.

Tax Services for Businesses:

- Income tax compliance and reporting: corporate, partnership, and high net worth individuals
- State and local tax strategies and planning
- International tax strategies and planning
- Investment planning and tax considerations
- Compensation planning and analysis of equity compensation
- Trust accounting and taxation
- Structuring new business and transactions
- Business succession planning
- Retirement and benefits planning
- Representation before tax authorities
- Assistance with tax examinations and tax notices.



For High Net Worth Individuals

SDDco-PC knows that time, trust, and expertise matter when servicing high net worth individuals and their families. We can assist you with college funding objectives, protecting your wealth, preserving your lifestyle in retirement and bequeathing assets to loved ones. Our professionals can help identify tax saving opportunities that lessen and defer present and future tax payments related to charitable donations, income and capital gains tax, and other areas of tax compliance. Additionally, if you are facing complexities associated with international investments; you can count on SDDco-PC's understanding of foreign regulations to uncover benefits and avoid penalties so you get the most out of your tax return.

Tax Services for High Net Worth Individuals:

- Preparation of federal income tax returns
- Preparation of state /multi-state income tax returns
- Preparation of federal and state gift tax returns
- Preparation of US tax returns for citizens abroad
- Transaction advisory
- Year-end tax planning
- Multi-year tax projecting
- Investment planning and capital gains considerations
- Charitable giving and tax considerations
- Family owned business succession planning
- Retirement planning and pension / IRA distributions
- International tax matters
- Representation before tax authorities
- Assistance with tax examinations and tax notices.

Tax Information:

Visit our monthly Tax Newsletter for useful tax planning articles: <http://sddco.com/resources/newsletters/>

Contact Tax Partner, Philip Lebovits for an introductory consultation: plebovits@sddco.com • 212-751-4422 x 319