TAX

CRESSET

It's not how much you earn, it's how much you **keep.**

Tax Planning and Projections

Coordinated support from Tax & Planning to create strategies designed to minimize your taxes over time:

- Tax-aware investing
- Strategies to minimize/offset realized gains
- Tax-free income strategies
- Quantified impact of your planned transactions, such as business sales and executing stock options
- Custom tax-loss harvesting, offsetting taxes on both gains and income
- Impact analyses of tax policy changes
- Tax residence analysis
- Partnership and Trust expertise
- Advanced gifting strategies
- Special circumstance planning, including same-sex / unmarried couples and marriage or divorce

Tax Payments

Monitor your income, gains and losses throughout the year:

- Evaluation of federal and state withholdings
- Tax projections
- Estimated payment assistance and tracking account activity with the IRS

Tax Return Preparation[1]

Prepare your individual, trust and family partnership returns:

- Electronic tax organizer
- Filing cabinet with your returns via your True Fiduciary® Vault
- e-file

Provide tax guidance to your CPA on your specific situation.

Tax Controversy

Resolve and respond to correspondence you receive from IRS and state authorities, including:

- State audits
- Inquiries
- Penalty notices

[1] *Tax preparation commitment is subject to review. Tax Preparation Services are provided by Cresset Tax Services, LLC ("Cresset Tax"), an affiliate of Cresset Asset Management LLC d/b/a PagnatoKarp, which is a registered investment advisor ("Advisor"). Individuals who provide Tax Preparation Services on behalf of Cresset Tax areaffiliatedwith Advisor and may provide services on behalf of Advisor.*

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