



## Tax Consulting

### Capitalize on opportunities and maximize saving potential.

Any accounting professional can help you with a basic tax return. But if you are looking to grow your business or personal wealth, minimize costs and maximize your cash flow, you need someone who can look beyond a simple tax return and find as many savings opportunities as possible throughout the process.

The Hall, Kistler team has significant expertise in a wide range of industries and market segments, including Oil & Gas, Manufacturing, Healthcare, Real Estate and more. This experience allows us to provide proactive tax advice that's specific to you and your unique situation, whether you own a business, have a lot of personal investments or are part of a wealthy estate. Our goal is to help you capitalize on opportunities and make the most of your potential for tax savings.

### What You Get With Tax Consulting Services

No matter how straightforward or how complex your financial picture, the Hall, Kistler team will proactively seek out all possible ways we can help you reach your goals. We'll meet with you regularly and work closely with you to provide peace of mind. Our goal is to help you remain financially secure in the present while identifying methods that facilitate growth over the long term.

- ✓ Preparation of income tax return filings
- ✓ State and local tax expertise
- ✓ Tax structuring and transaction assistance
- ✓ Tax planning and research
- ✓ International tax assistance
- ✓ Representation before the IRS, state and local taxing authorities

#### Businesses

- ✓ Executive compensation and bonus plans
- ✓ Merger and acquisition representation
- ✓ Research and development credits
- ✓ Cost segregation studies
- ✓ Other federal, state and local tax credits
- ✓ State Nexus planning

#### Individuals

- ✓ Planning for real estate and real estate professionals
- ✓ Analysis of conversion of qualified retirement funds from traditional to ROTH
- ✓ Charitable giving strategies
- ✓ Planning for closely-held business interests
- ✓ Gift and estate tax planning and preparation



## Estates & Trusts

- ✓ Preparation of estate and gift tax returns and related filings
- ✓ Trust and estate distribution planning
- ✓ Trust funding analysis
- ✓ State nexus planning
- ✓ Limited Liability Company planning and preparation
- ✓ Transfer tax valuation of hard-to-value assets
- ✓ Preparation and planning for specialized trusts, including charitable trusts, special needs trusts, grantor retained annuity trusts and intentionally defective grantor trusts



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