

TAX SERVICES

www.cdlcpa.com | 561-832-9292

EFFECTIVE TAX PLANNING IS AN ESSENTIAL STEP TOWARD ACHIEVING YOUR FINANCIAL GOALS.

At Caler, Donten, Levine, Cohen, Porter & Veil, P.A. (CDL), tax consulting means more than just completing tax returns. The decisions you make today about your taxes can affect your individual, family and/or business assets throughout your lifetime. At CDL, we partner with you to define your goals, analyze your total financial picture and forecast the future tax consequences of your financial choices. We have the knowledge and expertise to help you every step of the way.

Our extensive tax experience includes the following areas:

- CORPORATE
- MULTI-STATE
- TRUST AND ESTATE
- HIGH NET WORTH INDIVIDUALS
- REAL ESTATE
- RESTAURANTS AND HOSPITALITY
- CONSTRUCTION
- DISTRIBUTION AND MANUFACTURING
- NOT-FOR-PROFIT ORGANIZATIONS

CDL - WHERE ACCOUNTING IS MORE THAN JUST NUMBERS.

All client situations are as unique as the individuals we represent, but our focus remains on helping you achieve personal financial goals.

The CDL Tax Service Practice provides integrated services together with our Family Office Division.

Individuals and families that have achieved a substantial level of prosperity have complex needs and often require expert advice and planning. We have a long history of assisting clients with estate planning needs and goals, including succession planning for family owned businesses, utilization of trusts and other vehicles to manage estate and gift taxes and other strategies designed to meet each family's estate planning goals. Whether your goals are to maintain privacy, minimize taxes on the transfer of assets and/or maintain certain assets within your family, CDL can help design and implement appropriate strategies.





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CDL OFFERS TAX SERVICES IN THE FOLLOWING AREAS TO HELP YOU MAXIMIZE YOUR OPPORTUNITIES:

Income Tax Planning and Compliance

The way you manage your income for tax purposes may have a significant impact, not only on your annual tax liability, but also on your ability to meet your long-term financial objectives. Our approach helps you formulate and implement a tax plan designed to achieve your overall financial objectives.

- INCOME TAX PLANNING AND PREPARATION OF FEDERAL, STATE AND LOCAL TAX RETURNS
- EMPLOYMENT TAXES
- SALES AND USE TAX
- MULTI-YEAR AND TRANSACTIONAL TAX PLANNING
- REPRESENTATION BEFORE FEDERAL, STATE AND LOCAL TAXING AUTHORITIES
- LIKE-KIND EXCHANGES AND OTHER REAL ESTATE TAX MINIMIZATION STRATEGIES
- ENTITY STRUCTURE AND START-UP ADVISORY SERVICES
- BUY-SELL AGREEMENTS AND BUSINESS SUCCESSION PLANNING
- PLANNING FOR OFFICERS' COMPENSATION AND FRINGE BENEFITS, INCLUDING ANALYSIS OF PENSION AND PROFIT-SHARING PLAN OPPORTUNITIES
- ANALYZING ACQUISITIONS AND SALES OF BUSINESSES

Estate and Gift Planning

Safeguarding your estate is one of the most important things you can do. Smart estate and gift planning minimizes estate and income taxes for your heirs, provides a secure financial future for you, helps ensure that future generations benefit in the manner you desire and can protect your assets from liability claims.

AS MEMBERS OF YOUR TEAM OF ADVISORS, CDL PROFESSIONALS WORK CLOSELY WITH YOU, YOUR ATTORNEY AND/OR TRUST OFFICER TO HELP YOU ACHIEVE YOUR FINANCIAL OBJECTIVES.

Trust Planning and Compliance

When you establish a trust, key considerations include the type of assets to transfer, whether you want to retain any benefit during your lifetime and your degree of control over when and how your heirs use the assets. Changes in law, as well as changes in your family or financial situation, may also impact trust planning. As your tax advisor, we are continuously involved with your financial matters to help you establish - and maintain - a well-designed trust.

Charitable Giving, Philanthropy and Private Foundations

Both you and your favored charity or private foundation can benefit greatly from philanthropic giving. Our tax professionals help you develop the most advantageous plan, from timing of your contribution to the establishment of a charitable trust. Choices abound, and we will help you through the process from concept to implementation.

