# High Net Worth Tax Support

## Effective Planning Strategies

LVBW supports high net worth clients: business owners, executives in privately held or publicly traded entities and families that have complex financial and tax considerations. Increased investment activity and multiple sources of income require proactive planning delivered by advisors with experience in minimizing or deferring tax liabilities.

### We Create a Tax Plan

We start with what your financial position is today and then work with you to understand your goals. Our team works in coordination with outside advisors such as your attorney or investment advisor to create an integrated approach to address issues unique to each client. We look for proactive ways to minimize taxes and plan for the cash flow required to meet tax obligations.

### Generational Tax Support

Our professionals develop a tax strategy and help families with estate plans, trusts and gifting. Transferring family wealth is a goal that we help you achieve.

### Does Your CPA Make You Feel Important?

You would not be just another client to us. To get started, let us examine your tax returns, talk about your goals and tax strategy, and identify what is important to you.

### High Net Worth Support Includes:

- Tax Analysis & Projections
- Tax Services for Family Partnerships & LLCs
- Estate, Trusts & Gifting Strategies
- Charitable Giving
- Tax Planning for Retirement Payouts
- Divorce & Family Disputes
- Stock Option Strategies
- Personal Financial Statements
- Tax Planning & Return Preparation

### Taxes Should Never Be a Surprise

Our Tax Plan helps plan for and defer tax liability. Our professionals view taxes as an ongoing event rather than a once a year activity. We look at your unique tax profile and develop a personalized strategy to allow you to achieve your objectives.

LVBW LLP
Accountants & Consultants

## The Next Step

Take the first step and call us today at 716.204.9000 to see what our firm can do for you.