Income Tax Planning

Safeguarding Your Legacy

Navigating the intricacies of income tax planning is essential for safeguarding your financial legacy and ensuring that your wealth transitions smoothly to future generations. Our approach is rooted in a deep understanding of your aspirations, focusing on optimizing your tax position while fulfilling your broader estate and wealth transfer goals. Whether it's strategizing business distributions, orchestrating charitable contributions, or planning for the seamless transfer of assets, we are committed to minimizing your tax exposure and maximizing the value passed to your beneficiaries, all within the framework of your vision for the future.

Reach

Our attorneys are well-versed in creating sophisticate tax-efficient strategies tailored to the unique needs of high-net-worth individuals, families, and business owners. We have deep experience in a wide range of tax planning scenarios, from the complexities faced by entrepreneurs and business entities to the nuanced needs of affluent families and individuals. We excel in addressing the multifaceted aspects of income tax planning, including succession planning, wealth distribution, and charitable giving, ensuring that every strategy is aligned with your long-term objectives. We work with private equity firms and family offices on gifting strategies, such as gifting business interests prior to a liquidation event and gifting carried interest, to help minimize wealth transfer tax liability.

Approach

Our methodology is proactive and personalized, focusing on understanding your unique financial landscape and tailoring our advice to your specific goals. We engage in comprehensive planning that goes beyond immediate tax savings, considering the broader implications on your estate and wealth transfer plans. By integrating sophisticated tax planning techniques with your overall wealth management strategy, we aim to create a cohesive framework that not only reduces your tax liability but also enhances the growth and management of your wealth for generations to come.

Areas of Focus:

Federal tax audits and litigation in U.S. Tax Court and U.S. District Courts

Tax-exempt status management

Tax-advantaged transactions, including tax-free exchanges, corporate mergers, reorganizations, spin-offs, limited liability companies, gifting business interests and carried interest and sales and leasebacks

Business succession planning

Foreign tax goods structure planning (inbound and out-bound)

Coordination of income and gift/estate tax planning

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