

## Minimizing Taxes, Maximizing Value, On-time Service

As tax laws grow in complexity, tax planning and preparation grow in difficulty. Specialized tax planning is crucial to individual and business success today. Most individuals, families, and companies simply want to maximize after-tax cash flow while minimizing the headache and hassle associated with planning for and preparing year-end taxes.

At RotenbergMeril, our taxation services are centered on ensuring that all of your tax planning and preparation needs are met without frustration and without paying more than you have to. You can feel confident that our resources, experience, and credentials rival those of any large national firm. At the same time, you can be confident that we'll provide our services with creativity, innovation, and highly personalized service.

### Taxes Are Not a Seasonal Event

Tax planning is a year-round event and must be managed accordingly. Our approach to the tax aspects of financial management goes beyond simply meeting statutory requirements. We also advise each client on the most advantageous techniques available for minimizing or deferring income taxes while maintaining regulatory compliance to prevent costly penalties. Our entire team of professionals, including our partners, is always available to allay concerns and answer questions about the rules that apply to your financial activity and situations.

Through our association with the MSI Global Alliance, we offer the strength of a well-established international network operating in more than 90 countries. Furthermore, our client portal allows access to your financial documents in a secure environment.

### Forward-thinking Guidance, Straightforward Solutions

At RotenbergMeril, our main priority is to help you understand and reduce your tax burden. To achieve that goal, we make it our business to fully understand your individual and business tax concerns so that we can apply our extensive knowledge and experience in the most appropriate and beneficial way.

With a comprehensive understanding of federal, state, multi-state, local, and international tax regulations, our seasoned tax professionals offer a full range of



### You Work Hard for Your Money

That's why the foremost goal of the tax professionals at RotenbergMeril is to help you keep more of what you have earned. Our dedicated team is skilled at finding opportunities to minimize or defer taxation using the latest techniques available while staying up to date with ever-changing and increasingly complex tax laws.

When you engage RotenbergMeril, you benefit from our:

#### KNOWLEDGE AND EXPERIENCE

With ready access to senior-level talent, you can rest assured that you will receive the highest level of technical knowledge and expertise. Advanced and continuing education in tax planning ensures that we will recognize potential roadblocks and take advantage of all available opportunities in your pursuit of financial success.

**LONG-TERM SUPPORT** We don't just crunch numbers once a year. Instead, we get to know your evolving business needs and help you put business strategies in place that enable better decision making over the long-term. Once tax season is over, you can count on us to offer ongoing consulting and planning services that help you reach your goals.

services and solutions. We offer basic tax planning and compliance as well as detailed transactional analysis for individuals and/or organizations. We serve a variety of industries ranging from life sciences and professional services to construction and manufacturing.

#### **Business Taxation**

- Preparation of business tax returns
- Federal, state, and international tax consultation
- Transfer pricing and cost segregation studies
- Sales tax and payroll tax compliance
- Representation of your firm before taxing authorities such as the IRS

#### **Estate & Retirement Planning**

- Personal, insurance, and estate planning
- Family gift and charitable planning
- Retirement income and business succession planning
- Pension and profit-sharing planning

#### **Compliance & Preparation**

- Tax return preparation for public corporations, private equity funds, hedge funds, privately held businesses and high-net-worth individuals

#### **FAS 109 Tax Provision**

- Computation of tax provision: we have the combination of GAAP and tax knowledge required to accurately complete this process

#### **Individual Taxes**

- Complex individual tax compliance and state tax analysis
- Coordination of business and personal tax burdens
- Compliance with foreign reporting requirements

#### **International Taxes**

- Tax consequences of doing business abroad
- Foreign investment in real estate and personal property
- Tax treaty analysis
- Expatriate and in-patriate tax services

#### **Mergers & Acquisitions**

- Financial and tax due diligence
- Future financial projections
- Negotiations and facilitation

#### **Tax Examinations**

- Expert representation in federal and state tax audits

#### **Trusts & Estate**

- Grantor trusts
- Family limited partnerships
- Charitable lead unitrusts
- Generation-skipping trusts
- Dynasty trusts

## **Experience. Vision. Clarity. Knowledge.**

Hiring the right firm for your tax planning and return preparation is vital to your financial success. Both *NJBiz* and *New Jersey Business Magazine* rank RotenbergMeril as one of the top accounting firms in New Jersey, and our firm has recently been recognized by *INSIDE Public Accounting* as one of the Top Five Fastest Growing Firms in the Northeast. When you need a powerful ally in the areas of tax planning and return preparation, rely on RotenbergMeril.

## **Welcome to RotenbergMeril, where results exceed expectations.**

To learn more about our firm's capabilities and how we can serve your tax planning and preparation needs, visit [www.rmsbg.com](http://www.rmsbg.com) or call (201) 487-8383.

RotenbergMeril is PCAOB registered and a member of the Center for Public Company Audit Firms, the Employee Benefit Plan Audit Quality Center, and the Forensic Valuation Services (FVS) section of the American Institute of Certified Public Accountants. We offer comprehensive technical skills, extensive knowledge and experience, and a sustained commitment to personal attention that help our diverse clients meet their financial and regulatory objectives. Our integrated and specialized services include:

- Audit & Accounting Services
- Public Company & SEC Services
- Benefit Plan/ERISA Services
- Taxation Services
- Financial Outsourcing Services
- Litigation Support and Valuation Services
- International Consulting

**We invite you to learn more about us at [www.rmsbg.com](http://www.rmsbg.com).**

