Tax Consultation and Preparation

Team

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Overview

Understanding and managing the impact of taxes is critical for successful investing and financial planning.

Partnering with our team of tax specialists, Northeast advisors fully evaluate the after-tax outcomes of different planning options before any final decisions are implemented.

In addition, we prepare tax returns for many of our investment management and trust clients. By preparing returns in-house, we are able to streamline the process, reducing the involvement required of our clients.

Our tax-related services include:

- Individual income tax returns
- Fiduciary income tax returns
- Gift tax returns
- Tax consultation
- Use of tax-advantaged retirement accounts
- Evaluation of the tax impact of estate planning and charitable giving

