WINDHAM BRANNON
offering more

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SERVICES FOR HIGH NET WORTH INDIVIDUALS

MORE SPECIALIZED SERVICES

- Advice regarding tax efficient diversification of concentrated stock positions
- Strategies for charitable planning, including use of charitable trusts, private foundations, and donor advised funds
- Executive compensation planning, including planning for deferred and equity compensation
- Trust planning for testamentary and lifetime trusts
- Assistance with administration of trusts and estates
- Services to family offices, including tax return preparation and tax planning
- Tax planning for distributions from retirement plans
- Multi-state tax services, including domicile and residency planning
- Representation in federal and state income and estate tax audits

MORE EXPERIENCE

Windham Brannon's high net worth tax group helps our clients reduce the complexity of managing significant assets. Our highest priority is to proactively provide value-added income tax and estate tax planning advice. We prepare complex income tax returns of all types, including individual, business, trust, gift, and estate returns. Because our clients often own offshore financial accounts, we are very experienced in handling the special income tax reporting requirements for foreign assets.

ABOUT WINDHAM BRANNON

For over 60 years, Windham Brannon has served clients in assurance, tax and advisory services for businesses and high net worth individuals. With Windham Brannon, you'll find exceptional expertise... and more.

PRACTICE LEADERS

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