



# TAX

## PRIVATE CLIENT SERVICES

### Our Commitment...

We always listen. We're always here for you.

### Collaboration, Navigation & Simplification

Alvarez & Marsal Private Client Services is dedicated to helping clients successfully manage wealth and plan for the future by acting as the family CFO overseeing all aspects of their personal and business interests. Our priority is to work with clients to achieve their long-term goals and deliver highly personalized solutions that suit our client's unique needs. We serve as your advisor, advocate, teammate and partner maintaining the anonymity and security you desire.

As part of a successful global professional services firm established in 1983, our extensive team of tax professionals are located all across the U.S. to provide clients with customized and tailored solutions. Our practice is committed to the highest ethical standards, seamless execution and value delivery, while maintaining the anonymity and security you desire.



#### Family Office Services

- Accounting and Entity Reporting (trusts, LLCs, partnerships and offshore entities)
- Record-Keeping (real-time information in a centralized and confidential manner)
- Risk Mitigation
- Administrative Services (bill pay services and other administrative support)
- Family Governance and Corporate Governance



#### Tax Advisory Planning & Compliance

- Tax Preparation Services (individual, estate and trust, US and foreign businesses)
- Pre-Immigration and Expatriation Planning
- Investment Planning for Inbound and Outbound Investment
- Foreign Tax Credit and Tax Treaty Planning



#### Trust & Estate Planning

- Succession and Estate Tax Planning
- Preparation of Gift Tax Returns
- Comprehensive Wealth Transfer Analyses
- Preparation of Asset Ownership and Beneficiary Designations Summaries

# How we do it:

## Private Client Services at the center of it all

Our practice is designed to complement and work with your advisors. We bring our clients peace of mind by collaborating, connecting on and overseeing an intricate network of professionals.



- Dedicated teams led by experienced senior professionals
- Streamline processes and procedures to improve financial reporting
- Create meaningful deliverables and actionable plans



- Craft financial scenarios, so you can write the next chapter
- Establish new family structures
- Provide estate/trust planning



- Provide financial and tax guidance
- Support stakeholders and the future

### Key Contact



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### ABOUT ALVAREZ & MARSAL TAX

Alvarez & Marsal Tax, part of Alvarez & Marsal (A&M), a leading global professional services firm, is an independent tax group made up of experienced tax professionals dedicated to providing customized tax advice to clients and investors across a broad range of industries. Its professionals extend A&M's commitment to offering clients a choice in advisors who are free from audit-based conflicts of interest, and bring an unyielding commitment to delivering responsive client service. A&M Tax has global presence in major metropolitan markets throughout the Americas, EMEA, and APAC.

Alvarez & Marsal Tax is a founder of Taxand, the world's largest independent tax organization, which provides high quality, integrated tax advice worldwide, and represents the Global Network in the US and UK. Taxand professionals, including 770+ partners and more than 3,000+ advisors in 48 countries, grasp both the fine points of tax and the broader strategic implications, helping you mitigate risk, manage your tax burden and drive the performance of your business.

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