



ALVAREZ & MARSAL TAXAND 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 achieve their long term goals. Our priority is to deliver highly personalized solutions that suit our clients unique needs. Our team serves as your advisor, advocate, teammate and partner maintaining the anonymity and security you desire.

Sitting within a successful global professional services firm established in 1983, our practice is accustomed and committed to the highest ethical standards, seamless execution and value delivery.

Family Office Services

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

Tax Advisory Planning & Compliance

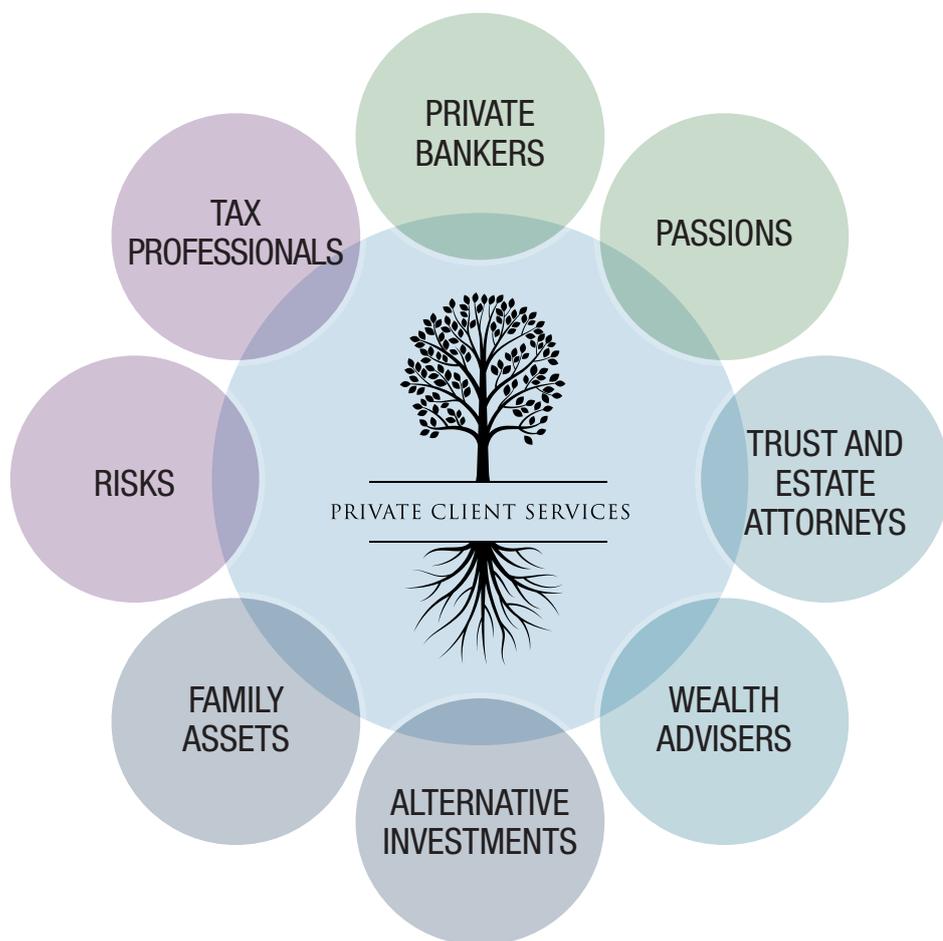
- Tax Preparation Services (for individual U.S. income tax filings and trust/estate tax filings)
- Tax Preparation Services (for business tax returns including U.S. entities with U.S. and/or foreign business activity and foreign entities with U.S. activities or ownership)
- Pre-Immigration and Expatriation Planning
- Investment Planning for Inbound and Outbound Investment
- Foreign Tax Credit Planning
- Tax Treaty Planning and Advising

Trust & Estate Planning

- Estate Tax Planning
- Preparation of Gift Tax Returns
- Comprehensive Wealth Transfer Analyses
- Preparation of Asset Ownership and Beneficiary Designations Summaries
- Recommendations (for income, business activities and personal financial goals based on income tax planning)

Private Client Services at the Center of It All

Our practice is designed to compliment 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
- Experienced senior professionals



- Consistent and Proven
- Robust, tested process methodologies



- First Class Client Services
- Responsiveness and best-in-class execution

FOR MORE INFORMATION, CONTACT ONE OF OUR EXPERTS:



Alan Kirschenbaum

Managing Director,
akirschenbaum@alvarezandmarsal.com
+1 305 704 6690



Juan Carlos Ferrucho

Managing Director,
jferrucho@alvarezandmarsal.com
+1 305 704 6670



Vicky Castro

Managing Director,
vcastro@alvarezandmarsal.com
+1 305 704 6735

ABOUT ALVAREZ & MARSAL TAXAND

Alvarez & Marsal Taxand, LLC, an affiliate 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 Taxand has offices in major metropolitan markets throughout the U.S. and serves the U.K. from its base in London.

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Alvarez & Marsal Taxand is a founder of Taxand, the world's largest independent tax organization, which provides high quality, integrated tax advice worldwide. Taxand professionals, including almost 400 partners and more than 2,000 advisors in nearly 50 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.

To learn more, visit www.alvarezandmarsal.com or www.taxand.com