

innovative **TAX PLANNING**



LINCOLN
TAX & WEALTH MANAGEMENT

LINCOLN TAX AND WEALTH MANAGEMENT (LTWM), RECOGNIZES THAT EVERY BUSINESS DECISION CARRIES TAX IMPLICATIONS. THE PHILOSOPHY AND OBJECTIVES OF LTWM ARE TO ACT AS BUSINESS AND FINANCIAL CONSULTANTS, CREATING FAVORABLE OUTCOMES FOR EACH CLIENT SITUATION.

LTWM PRIDES ITSELF IN OFFERING CURRENT, INNOVATIVE TAX, CONSULTANCY AND WEALTH PLANNING SERVICES WITH A PERSONAL TOUCH AND ATTENTION RARELY FOUND IN PUBLIC ACCOUNTING.

TAX PLANNING, FINANCIAL CONSULTING AND ACCOUNTING SERVICES:

- Choice of Entity and Formation
- Liquidations & Restructuring
- Year-End Tax Planning
- Estate & Gift Planning
- Like-Kind Exchanges
- Analysis of Tax Credits and Deductions
- Capital Gain Planning
- Other Tax Deferral and Minimization Techniques
- Portable CFO/Controllership Services
- General Management Interim Services
- Risk Management Services
- Financial Consulting Services

TAX COMPLIANCE SERVICES

Preparing income tax and information returns for:

- Individuals (self-employed, business owners, high-net worth)
- Corporations (Both "C" and "S" Corporations)
- Partnerships & Limited Liability Companies
- Estates and Trusts

PLEASE CONTACT US TO SCHEDULE A FREE INITIAL CONSULTATION:

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