

Tax Planning Preparation

Whether you are an individual or an entity, income taxation has rarely been as complex as its current state. We help our clients navigate an extremely complicated and rigorous tax code.

We believe educating our clients on the respective tax rules is as important as planning and compliance in and around their tax situation. There are few “gimmies” as it relates to tax rules and therefore planning is extremely important. Our planning process is a transparent and thoughtful process. It entails a careful question-and-answer process designed to understand our client’s goals and pressure points and translate these into net cash savings. There is no silver bullet as it pertains to tax planning or no one-size-fits-all.

Our tax planning considers both short-term and long-term goals of our clients. These goals are linked; often times short-term gratification can get in the way of long-term strategies. Because of this our tax planning considers your long-term strategies as well.

We don’t view tax planning as a one-time event during a year in fact we believe it is a constant process that should be readdressed at pivotal times during the year.

“At WNDE, our tax practice philosophy is to be extremely proactive in client relationships. We encourage ongoing communication. We endeavor to provide sophisticated tax planning services and see it as our obligation to act as advocates for our clients. We are a “go to” resource for complex financial issues, and are always available on a real-time, as needed, basis. We partner with our clients to meet compliance requirements, positively impact the bottom line, and minimize taxes.”

- Dave Krickl
Tax Partner

For tax planning and preparation services contact White Nelson Diehl Evans by calling us at **714- 978-1300**.