

GIFT AND ESTATE TAX PLANNING VALUATION SERVICES

Protecting Your Financial Legacy for Future Generations

A critical challenge facing many business owners is protecting the wealth that they have worked so hard to build, and ensuring that their assets are transferred to their heirs, rather than being used for estate taxes and administration costs.

YOUR BUSINESS NEEDS

If an ownership interest in a privately-held business is one of your assets, a key to gift and estate tax planning is ensuring that the value of that ownership is properly understood and that your plans protect that value as effectively as possible. A well prepared valuation can allow business owners to avoid challenges from the IRS, and, if dividing their assets among more than one heir, plan for the best way to allocate those assets.

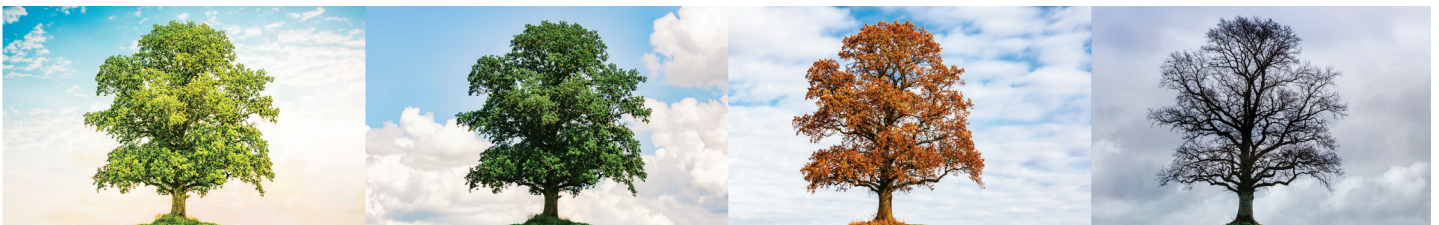
OUR SOLUTION

At Dopkins & Company, we have extensive experience in preparing and consulting on valuations for tax related purposes. Members of our valuation services group have been engaged to assist individuals and companies in meeting their tax planning and reporting requirements. Extensive and up-to-date knowledge of ever-changing tax laws and deep industry expertise are hallmarks of our senior valuation personnel.



Estate and gift tax
planning and compliance

Our valuation services group provides the independence and integrity that are the cornerstones of preparing valuation support for a defensible tax position. We take the time to understand every aspect of a business in order to generate an appropriate valuation. We have extensive experience in assisting our clients defend their valuation positions in matters before the Internal Revenue Service, state tax authorities, foreign governments and other tax-related entities.



BUILD. PROTECT. TRANSFER WEALTH. **WITH DOPKINS.**

YOUR VALUATION TEAM

FOR MORE INFORMATION ABOUT DOPKINS BUSINESS VALUATION SERVICES, CONTACT:



Brendan P. Brady CPA, CVA

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Brendan leads assurance engagements as well as internal control projects in a wide range of industries. He spends a significant portion of his practice on transactional advisory consulting services for privately held and family-owned business.



Teresa M. Majors CPA

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Teresa works with local public and private companies providing assistance with tax compliance, tax provision issues, Sarbanes-Oxley compliance, and FIN 48 implementation. She has broad based experience including working with both public and private companies and their executives and owners. She has extensive experience with multi-state corporations, consolidated return issues, mergers and acquisitions, and tax provision issues.



Albert A. Nigro CPA, CVA

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Al provides accounting, tax, outsourced accounting and consulting services for privately held companies, and consults on: business start-up and entity formation, financing coordination, design and implementation of financial accounting and reporting systems, income tax planning, estate tax planning, succession planning and business valuation. Serving clients in a variety of industries, Al has a concentrated area of specialization in health care, with a focus on medical practices. He provides services including strategic planning, operational consulting, income tax planning and business valuation.



Robert E. Pollock CPA, CVA

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Bob is Chair of Dopkins Tax Advisory Group. His practice has covered many industries, with a primary focus on tax and financial matters encountered by closely held business operations and their owners. He has significant experience dealing with federal corporate income, federal personal income, state and local income, estate and gift and sales tax matters.



Stephen C. Studley CPA CVA CFP ChFC CLU

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Steve provides income tax planning, accounting and consulting services to a variety of clients and industries. While he serves clients in many different industry sectors, he specializes in servicing physicians and medical groups and practices.



Gregory J. Urban, CPA, CVA

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Greg's main focus is on providing tax consulting, compliance and valuation services to privately held businesses and their owners. He has extensive experience advising clients on complex tax compliance issues, including tax credit optimization, mergers and acquisitions. In addition, Greg performs and consults on a variety of business valuation engagements, including valuations relating to transfer tax issues and purchase price allocation issues. Greg also represents clients before the Internal Revenue Service and various state taxation departments.