

Businesses and individuals face a wide range of choices and challenges in their quest for financial health and security. Strategic and effective tax planning is essential to making the right decisions along the way.

Grassi's tax specialists understand the changing tax landscape and its implications on your wealth, business, retirement and estate plans. Our tax planning strategies are customized to meet your unique needs and adjusted as your priorities and tax situation evolve.

Our approach to tax planning, compliance and advisory services is designed to ensure every tax move you make is aligned with your overall business and financial objectives. Our professionals advise on tax planning throughout the year, keeping you informed of legislative updates and tax savings vehicles that can help you achieve your tax mitigation and wealth preservation goals.

#### **Business Tax Services include:**

- Income Tax Planning & Projections
- State & Local Tax
- International Tax Services
- LIFO Consulting
- Tax Structuring
- Tax Controversy
- Tax Credits & Incentives
- Tax Return Preparation & Compliance
- Tax-Exempt Organizations
- Transaction Advisory & Structuring

#### **Individual Tax Services include:**

- Income Tax Planning & Projections
- State & Local Tax
- International Tax
- High-Net-Worth Services
- Tax Controversy
- Tax Credits & Incentives
- Tax Return Preparation & Compliance
- Trust & Estate Planning
- Charitable & Gifting Strategies
- Retirement Planning



**Jeffrey Cohen, CPA**  
*Partner, Tax Services Leader*  
jcohen@grassicpas.com | 516.336.2475