TAX

Private Client Services

Stewardship for Today. Meeting Your Goals for Tomorrow.



Go beyond typical trust and estate services to engage a team dedicated to multigenerational planning.

Complex Estates Require Thoughtful Stewardship

CBIZ's hand-selected Private Client Services team comprises professionals who understand the complex issues families face as they work to manage and perpetuate their wealth over multiple generations.

To demonstrate the advantages of working with CBIZ, it's important to highlight our differentiators in this rapidly expanding sector:

We are not a rebranded tax department. Over the past decade, we have recruited a hand-selected team of seasoned financial professionals with the complementary expertise to achieve the unique wealth management goals of families managing multigenerational fortunes.

We are not an improvised team. Our Private Client Services team has the requisite expertise in wealth preservation strategies but is set apart by a cohesive, collaborative nature that enables us to tackle the most complex projects. Each engagement enjoys the unmistakable benefit of our team's ever-increasing maturity, dynamism, and efficiency.

We are not a small offering for legacy clients. Our practice began with the intention of filling a gap in the market — not simply as a means of capitalizing on existing relationships. We're actively seeking out and engaging those families that stand to benefit the most from of our multidisciplinary capabilities. Beyond managing large asset portfolios, our clients are often deconstructing or building family offices, seeking advice concerning monetizing events, stewardship and/or assistance with existing operations.

We're in harmony with a thriving ecosystem. We recognize the value added by wealth advisors, attorneys, governance specialists, and brokers, and have established strong partnerships with many of these professionals across the country. Furthermore, CBIZ itself is on the cutting edge of the emergent industries. In fact, we were one of the first firms to create a practice dedicated to digital currency. Being at the forefront of the crypto field, our knowledge and connections translate to unique advantages for our clients. As new economic forces emerge, we will continue to cultivate specialized resources that will help ensure even esoteric or novel issues can be resolved quickly and by those most capable.

Comprehensive Services

Our custom approach to wealth management incorporates the intellectual resources necessary to address needs ranging from building family offices to monetizing events.

Working with the company's professionals in corporate, flow-through, family office, international, and state and local taxation, we provide the full spectrum and emergent industries for private clients.

Family Office

- Prepare customized financial statements including cash flow analyses, income statements, balance sheets, and budgets
- Track alternative asset capital calls and distributions
- Household payroll services, including benefit administration and bill paying
- Assist with related entity administration: partnerships, trusts, corporations, and charitable foundations
- Reconciliation of bank, brokerage, and investment portfolios

Personal Income Tax Services

- Tax planning and consulting including entity structures for business liability and tax planning purposes (limited partnerships, limited liability companies, and S and C corporations)
- International tax planning
- Quarterly estimates, extensions, and tax returns
- Federal, state, and local income tax returns for individuals and entities

Estates & Trusts Planning

- Complex generation-skipping transfer tax issues
- Sophisticated income, gift and estate, and fiduciary tax return preparation
- Gift and income tax minimization
- Recommendations for planning techniques to effectuate desired goals
- Succession planning and review of buy-sell agreements
- Liquidity analysis for estates with illiquid assets
- Valuation of family partnerships and other entities
- Assistance to executors in navigating the estate administration process
- Mediation of family disputes over inherited/ inheritable assets
- Advisement to trustees of U.S. and foreign trusts regarding tax compliance issues for U.S. and foreign beneficiaries

Charitable Planning

- Charitable strategies using private foundations, donor advised funds, charitable remainder and charitable lead trusts
- Management of all charitable activities including grantmaking, distribution requirements and expenditure responsibility
- Sophisticated gifting and estate planning strategies
- Structured gifts such as university chairs, fellowships, trusts, and annuities
- Engaging heirs in philanthropic endeavors
- Preparation and filing of application for recognition of exemption
- Preparation of foundation tax returns, including unrelated business income tax returns, if applicable
- Overseeing of public disclosure compliance and governance
- Advisement to trustees of U.S. and foreign trusts regarding tax compliance issues for U.S. and foreign beneficiaries

CBIZ is a consulting, tax and financial services provider that works closely with CBIZ CPAs P.C., an independent CPA firm that provides audit, review and other attest services.

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