



TAX ADVISORY SERVICES

For many organizations and individuals, effective tax preparation and planning can provide very significant savings opportunities. The current tax environment is constantly changing. You need a tax advisor to keep you abreast of the various new laws and their impact on your tax situation. Without proper planning, certain transactions or missed opportunities could cost you considerably.

Schneider Downs' team of tax services advisors address many of our client's needs whether they relate to traditional tax preparation and planning services or more specialized services such as state and local or international tax issues. We can also step into difficult situations by offering tax outsourcing services to enable our clients to get through situations involving employee absences or staff shortages. We can assist our clients in every facet of tax compliance and planning including:

Tax Planning and Reporting

- » Business Tax
- » Individual Tax
- » Not-For-Profit Tax
- » Gift, Trust and Estate Services

Managed Tax Services

- » Outsourcing/On-Call Assistance
- » Income Tax Provisions - ASC 740 and IFRS

State and Local Taxes (SALT)

- » Abandoned/Unclaimed Property
- » Multistate Income/Franchise Tax
- » Sales and Use Tax
- » State Credits and Tax Incentives

International Tax

- » Expatriate Tax
- » Export Incentives
- » FATCA and Nonresident Withholding
- » Foreign Direct Investment in U.S
- » Inbound and Outbound Entity Structuring

- » International Tax Reporting and Planning
- » International Withholding Taxes
- » Transactional Analysis and Support Services
- » Transfer Pricing and Review of Cross-border Transactions

Tax Credit and Incentives

- » Research and Development Credits
- » Cost Segregation Services
- » Benefit Analysis Request
- » PA Educational Improvement Tax Credits (EITC)
- » Qualified Opportunity Zones (QOZ)
- » Tax Accounting Methods & Elections

Tax Transaction Advisory

- » Due Diligence
- » Exit and Succession Planning
- » Sales and Purchase Analysis
- » Structuring and Restructuring
- » Transaction Cost Analysis

No matter the challenges facing your organization, Schneider Downs has the resources and personnel available to meet your needs. Schneider Downs' in-depth understanding of current tax issues and your core business concerns will ensure that you comply with your tax filing requirements and achieve the maximum tax savings at the same time.



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This brochure describes certain services of Schneider Downs & Co., Inc. that may be available depending upon the client's particular needs. The specific terms of an engagement letter will govern in determining the services actually to be rendered by Schneider Downs to a particular client.