Private Client Services

Overview

For high net-worth families, executives, and business owners seeking integrated tax strategies, BPM does just that. We take our role as skilled advisor very seriously. By understanding your needs and goals, we are able to craft intelligent, personalized tax roadmaps that minimize your risks and maximize your peace of mind.

Sound Tax Advice

Our number one goal is to minimize your taxes. With a body of seasoned tax professionals who utilize all the tools available to increase your savings, we can handle everything from your tax return preparation, to comprehensive estate, gift, and trust planning, to stock option and retirement planning. We have a track record of proven strategies which we proactively apply to the diverse problems that our clients face.

For multinational families, our international tax team's deep expertise will ensure compliance with U.S. and foreign tax laws as well as increase tax savings. For individuals with philanthropic desires, we integrate charitable gifts into your overall estate, gift, and trust plan in a tax-efficient manner. For executives, we review stock plans and year-end strategies, which can result in significant savings. Explore the many opportunities in which our private clients benefit from our services and you will find a whole array of sophisticated solutions suitable for your needs.

A Road Map to Savings

Ultimately, what's important is our dedication to increasing your tax savings. As accounting professionals, we possess the proper foresight to maneuver you through the confusing maze of tax laws.

Contact

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