

Welcome!



**PRESTIGE
WEALTH ACCOUNTING GROUP**
Pro-Active Tax Planning Specialists

OUR COMMITMENT IS TO YOU

At Prestige Wealth Accounting Group, our commitment is to become your trusted advisor by providing you with the highest quality customer service, proactive planning, and customized strategies for your unique tax situation.



Prestige Wealth Accounting Group is an accounting firm established in 2008 that is committed to integrity, knowledge, and proactive service. This proactive service delivers strategic tax and accounting solutions using a consultative team-based approach for closely-held businesses and their owners, corporate executives, and high net worth individuals and families located in the New Jersey area.

We seek to develop long-lasting relationships and become your trusted advisor for your tax and accounting needs. We take a "hands on" proactive approach.

Prestige Wealth Accounting Group works in partnership with its affiliate, Prestige Wealth Management Group, which provides wealth management, financial planning, and estate planning services. Unlike other standalone accounting firms, we have direct resources to be able to provide you with answers to a wide array of tax and financial questions and needs.

Constantly changing tax laws are hard to keep up with. Compound that with your responsibilities at work and home and there could be multiple tax deductions and credits that you are missing out on. We have a dedicated staff of qualified professionals ready to help you take advantage of the tax laws for your unique situation.



BUSINESS OWNERS...

Do you often find keeping your financials and staying compliant to be a burden to your business? Prestige can help remove this stress and keep you focused on growing your business.

- Have you organized your business to maximize your tax savings?
- Are you taking advantage of all the legitimate deductions, credits, and strategies the tax code offers?
- Are you able to properly value your business?
- Do you have a succession plan in place?
- Do you have the right benefit plans in place to allow you to take advantage of funding your retirement while empowering employees to save for theirs?

Platinum Tax and Accounting Business Services

The government requires you to maintain proper records and to file tax returns. It can be overwhelming to stay compliant with tax laws and also keep your business growing. As your seasoned tax professional, Prestige Wealth Accountants will help you adjust to changing tax laws to minimize your taxes while staying compliant.

Let Prestige Wealth Accounting Group help. We are:

- **Proactive** – We keep you informed of the latest developments and how they impact your tax & financial situation.
- **Flexible** – We offer customized solutions specifically tailored to your needs.
- **Easy to work with** – We translate complex laws and regulations into practical solutions.
- **Comprehensive** – Whether for businesses, individuals, trusts, or estates, we provide you with comprehensive advice and guidance.
- **Secure** – We utilize state-of-the-art technology and procedures to keep your information confidential.

What sets us apart from our competition is our proactive service. Many accounting firms are reactive – they prepare your tax returns and wait for you to bring issues to them. The problem with this approach is that it requires you to know when to ask a question. With constant changes in your business and personal life along with changes in tax law, you may miss opportunities that proper proactive tax planning takes advantage of.

Our approach is different. We build a partnership with you. We take the time to understand your needs. We communicate with you throughout the year leaving you well informed to all the current tax planning opportunities.

As your trusted advisor, we take the time to understand your needs, then utilize our experience to craft solutions tailored specifically for you and your business.

In addition to tax preparation services we can help you with:

- Business Entity Selection
- General Ledger Review & Adjustments
- Business Review & Evaluation
- Business Consulting Service
- Financial Forecasts & Projections
- Computerized Bookkeeping
- Sales Tax Compliance
- Buy/Sell Arrangements
- Succession Planning
- Representation with Taxing Authorities



INDIVIDUALS...

We can assist you with:

- Taking full advantage of the current tax laws
- Year-round proactive tax planning
- Minimizing capital gains by performing tax-loss harvesting techniques
- Analyzing your retirement accounts to determine if a Roth IRA conversion makes sense for you
- Tax planning for executive stock options, RSUs, and executive compensation to minimize your taxation
- Handling the settlement of death of a loved one's estate and preparing their estate return
- Assist with an IRS or state audit

Platinum Tax Planning & Preparation for Individuals

We know that your life is busy but is trusting a computer application to find all of your deductions and planning opportunities the best solution? Through consulting, we often find many missed strategies that individuals should be utilizing to reduce their taxes. Experienced Prestige Wealth Accountants will sit down with you to understand your situation first and make sure you explore all available solutions to minimize your taxation on a federal and state level.

Tax Planning

Tax planning is an essential element of the tax preparation process. By making tax planning part of your overall financial planning strategy, you can use our experience and access to the most current new developments in the tax laws to minimize both your current and future tax liabilities.

Tax Return Preparation

Our experienced staff will work with you to accurately and efficiently prepare returns for you and your family. We utilize the latest software to ensure you are able to e-file and have your return processed quick and painlessly.

The bottom line?

Our experience combined with our own Proactive process will help you.

Our Proactive Accounting Services will:

- Educate you in a language you understand
- Help you implement a customized tax planning strategy
- Prepare and process your return keeping you informed throughout the process



PRESTIGE WEALTH ACCOUNTING GROUP: YOUR NEW TRUSTED ADVISOR

Our experienced Tax Professionals proactively tackle your complicated tax issues to keep you focused on where you want to go, advise you on how to get there, and continually remind you of the importance of maintaining a disciplined approach to your tax planning strategies.

Our personalized tax strategies deliver strategic tax reduction solutions using a consultative team-based approach for business owners, corporate executives, and high net worth individuals and families. In addition to our tax services, Prestige Wealth Management Group, our affiliated wealth management firm, provides timely and relevant communications on the economy, financial markets, tax law changes, and other key issues that are important to you.



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