

# TAX COMPLIANCE AND CONSULTING

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CAPTRUST guides many individuals, families, and business owners through the complex process of accumulating and protecting their wealth.

With a multidisciplinary team of professionals, the firm has a unique capability to help you make financial planning, insurance, and well-informed investment decisions. Our comprehensive financial and portfolio advisory services are designed to help busy high-net-worth individuals grow and protect their wealth.

## First Last

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## OVERVIEW

Achieving your financial goals amid today's complex tax landscape requires a coordinated and tailored approach. As part of your overall wealth management team, our tax advisors take an active role in planning discussions to develop a tax strategy aligned with your financial objectives.

At CAPTRUST, our integrated capabilities, depth of resources, and specialized tax experience are uniquely positioned to help you navigate change and reduce inefficiencies—while growing and protecting your wealth.

## TAX COMPLIANCE AND CONSULTING SERVICES

### Recurring Tax Return Preparation

- For individuals, flow-through entities, and gift taxes

### Recurring Tax Consulting

- Year-end planning
- Multiyear income and deduction timing
- Charitable gift planning
- Estate and gift tax planning
- Generation-skipping transfer tax planning
- Cash flow and tax planning
- Quarterly payment planning

### Nonrecurring Tax Consulting

- Large asset acquisition and disposition
- Investment tax implications

## ABOUT CAPTRUST

CAPTRUST Financial Advisors is a Raleigh-based investment firm with over 50 office locations across the U.S. Founded in 1997, the company has grown to include more than 1,000 employees. CAPTRUST is majority employee owned and in a position to deliver truly objective financial advice to the individuals, families, and institutions who are its clients.

CAPTRUST was built on the premise that investors are best served by advisors who are motivated to focus exclusively on the best interests of their clients. This commitment to independence and transparency has enabled CAPTRUST to grow from the vision of its entrepreneurial founders to become one of the largest independent advisory firms in the country.