



High Net Worth Tax Support

Effective Planning Strategies

Cowan Bolduc Doherty (CBD) supports high net worth clients; business owners, executives in privately held or publicly traded entities and families that have complex financial and tax considerations. Increased investment activity and multiple sources of revenue require proactive planning delivered by advisors with experience to minimize or defer tax liabilities.

We Create a Tax Plan

This is the cornerstone to our conversation with you. CBD advisors work with our clients to understand their financial objectives. We start with what your financial position is today and then work with you to understand your goals. Our team works in coordination with any outside advisors such as your attorney or investment advisor to create an integrated approach to address issues unique to each client. We look for proactive ways to minimize tax and to plan for the cash flow required to meet tax obligations.

Generational Tax Support

We support families with wealth or building wealth. Estate and gift taxation is the inevitable merging of life's two certainties; death and taxes. We will help you understand the strategies and implications of your potential estate and gifting plan. Our team helps you comply with the sometimes confusing income tax filing requirements of estates and trusts.

Create a Tax Plan

Our tax plan is the cornerstone to working with you. It creates a process for frequent communications which helps us stay connected to you.

High Net Worth Support Includes:

- Tax Planning & Return Preparation
- Personal Financial Statement
- Bill Payment
- Charitable Giving
- Estate, Trusts & Gifting Strategies
- Tax Analysis & Projections
- Tax Planning of Retirement Payouts
- Stock Option Strategies
- Divorce & Support Issues
- Tax Services for Family Partnerships & LLCs

Does Your CPA Make You Feel Important?

You are not just another client number with us. To get started, let us examine your tax returns and talk to you about your goals and tax planning strategy. We do this at no-cost so we can learn about your needs and you can understand that not all CPAs are the same.



ADVISORS.
ACCOUNTANTS.