

Tax Advisory Services



thinking strategically to your best advantage



Babush, Neiman, Kornman & Johnson, LLP
Certified Public Accountants & Consultants

With tax compliance so important and complex, BNKJ's comprehensive tax service begins long before returns are due or financial decisions are made.

At BNKJ, we recognize that every transaction has tax consequences. That's why our Tax Advisory Group is a cornerstone of our firm's services. We view tax planning as a key component of a unified strategic planning process and take particular pride in our tax expertise, extensive tax library and research materials.

Our corporate, partnership, individual, estate, fiduciary, state and local and international tax professionals work as a team with your legal, financial planning, banking and benefits advisors to integrate the most effective tax strategy into your overall goals.



With deep experience drawn from accounting, legal and tax backgrounds, BNKJ professionals can provide advice ranging from individuals in business to individuals with substantial private capital.

No matter if you are a high-earning individual, high net worth individual or closely-held business owner, BNKJ can help not only **ensure tax return compliance**, but also assist with planning for **future success**.

What's more, our tax practice has a range of specialties from **trust accounting** provided by CPAs who are also **attorneys** to **state and local tax experts**. Whatever the size or complexity of your enterprise, **BNKJ** can help you with **all your tax needs**.

- Individual tax planning and compliance.
- Corporate tax planning and compliance.
- Family business tax planning and compliance.
- Partnerships and limited liability companies.
- Exempt organizations.
- Multi-state tax structures.
- Tax controversy representation.
- Sales and excise tax matters.
- State and local taxes.
- Estate and gift tax planning and compliance.
- International tax planning.
- Foreign investors inside and outside the U.S.
- Trusts and charitable giving.
- Employee benefits.
- Personal financial and retirement planning.

Well-reasoned tax planning strategies can both reduce and defer your current and future tax burden. Our tax department can help with **long-term tax planning** for **gift and estate tax reduction, retirement planning** or **charitable giving** to a private foundation or public charity. The BNKJ planning process includes many elements.

- Year-end tax planning.
- Multi-year tax projections.
- Minimizing the impact of the alternative minimum tax.
- Tax strategies related to investment planning.
- Wealth transfer planning.
- Valuations for gifting.
- Retirement planning and distributions from qualified plans and IRAs.
- Family-owned or closely held business succession planning.
- Education funding strategies.
- Expatriate tax issues.

Our individually tailored approach to tax planning focuses on the complete picture of your family's financial status and goals.



Because BNKJ is attuned to the special needs of closely-held businesses, we can help you plan and grow with tax savings strategies.



Your company may be growing rapidly or just starting out, organizationally complex or family-owned. Whether you are a corporation, partnership, limited liability company, exempt organization, multi-state or international – we tailor our role to your business goals and immediate needs. If you do not have an internal accounting group, we'll roll up our sleeves and work side by side with your financial management team. If you have a strong internal accounting group, we'll provide the objective information and advice you require for informed decision-making.

BNKJ professionals are experienced in the tax aspects of business transactions and decisions companies encounter throughout the business growth cycle—from **selecting or revising business structures** to **sorting through the tax consequences** of vital business transactions.

- Initial business structuring.
- Acquisitions and mergers.
- Infusion of capital.
- Corporate restructurings.
- Employee incentive planning.
- International transactions.
- Exit strategies.

In today's fast-paced environment, **flexibility is the key to success.** State and local taxes, especially sales and use taxes, have become a significant cost of doing business as states scramble for additional revenues. Compliance has become very cumbersome and costly for businesses. Companies need **customized solutions** tailored to their **unique business needs**, whether they are a Fortune 500 company or just getting started. As **state and local tax specialists, BNKJ** stays **up-to-date** with the ever-changing state **tax laws.** That's why many Fortune 500 and middle market companies hire BNKJ's multistate tax group to work onsite and integrate with their accounting department. Our full complement of services for multistate transactions includes:

- Evaluating state and local tax filing requirements.
- Providing strategies to minimize state tax liabilities as a means to enhance cash flow opportunities.
- Analyzing sales and use tax compliance and reducing exposure.
- Representing taxpayers in state and local tax examinations.

Having worked with a wide variety of companies from Fortune 500 to middle market, BNKJ has developed a team of state and local tax specialists.



Our tax expertise ranges from businesses with a local focus to companies with their sights set on the world.



Many individuals and businesses depend on our expertise as they capture global business opportunities. We **specialize** in the area of **US taxation of foreign individuals investing and doing business in the United States**. BNKJ's international tax experts will work for your greatest tax advantage in connection with **in-bound and out-bound investments, foreign tax credit planning, transfer price analysis**, or selection of the right type of business structure to **minimize foreign and US taxes**.

BNKJ's international resources include membership in a worldwide association of independent accounting firms. This alliance is an additional means to assist clients in minimizing their tax burdens and complying with the laws of the various countries to which they are subject.



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