High Net Worth Individuals

Tax planning is vital for affluent individuals. Strategies to defer and minimize taxes are crucial, as is having a reliable estimate of tax liability at April 15th. In the ever changing and complex tax environment, it is essential to have trusted tax advisors who have experience, technical knowledge and a clear understanding of your financial goals. We work with you and your advisors to develop tax minimizing strategies at each stage of life: from maximizing tax-free earnings for college to deferring income for retirement as well as assisting in estate planning. Having a plan is key to tax minimization and deferral and maximizing cash flow.

EXPERT ADVICE FOR HIGH NET WORTH INDIVIDUALS

O'Connor and Drew's Certified Public Accountants have been providing tax planning and compliance services to high net,worth individuals for over 60 years. We provide accounting, tax (federal and multi-state) and financial guidance specifically customized for each individual based on your unique financial goals.

O'Connor and Drew offer a range of services and creative solutions to maximize an individual's financial and business opportunities. We are capable of solving specific complex issues, such as:

• Tax Compliance and Planning for Individuals, Estates and Trusts	• Succession Planning for Business Owners
• Closely Held Business Planning and Compliance	• Tax Guidance for Investment Strategies
• Retirement Planning	• Customized Budget & Spending Plans
• Estate and Gift Tax Planning	• Family Wealth Sharing Strategies

PROFESSIONAL, PROACTIVE, PRECISE.

No one likes a surprise on April 15th. At O'Connor and Drew, our tax specialists work closely with you throughout the year to provide a clear picture of what your tax liability will be. Whether you are changing investment strategies, own a business or have income-producing real estate, we are here to help you plan for the tax effects of the economic decisions you make. With over 80 professionals, we are a full-service firm who thrives on our client relationships and we support you all year long, helping you understand how your investments will impact your taxes. We provide timely advice to ensure you can make prudent financial decisions when you need to.

MORE THAN A TAX PREPARER: A TRUSTED ADVISOR

At O'Connor and Drew, we ensure you comply with tax deadlines and filing requirements. However, the service we provide doesn't end there. We are committed to providing you with superior advisory services that are tailored to fit your individual needs both now and in the future. Whenever you call us, you will receive carefully considered guidance and knowledgeable professional advice that you can rely on.

PLANNING AT EVERY STAGE OF YOUR LIFE

Are you concerned about the tax implications of exercising stock options from your employer? Interested in deferring tax on retirement savings? Perhaps you are considering the most tax-effective way to transfer your wealth to future generations? At O'Connor and Drew, we understand that every stage of life there are tax minimization opportunities. We work closely with your investment advisors and legal counsel to plan for your future including:

- Maximizing tax deferral on retirement investments including tax deductions in the current year, Roth retirement vehicles and "back door" Roth conversions
- Planning for income from investments including loss planning to offset taxable gains as well as providing you with options for tax deferred investments
- Assisting you in making decision about the complex tax issues involved in exercising or selling employer stock options
- Planned gifting and philanthropic planning.
- Providing an understanding about your options relating to accumulating tax-free earnings on savings for you children's college education
- Identifying your goals and assisting in developing a formula to transfer your assets to the next generation while minimizing federal and state taxes
- Supporting your business succession planning requirements, whether you desire to maximize your return in a Buy-Sell Agreement or transfer your business to the next generation of your family.

Contact Us

If you have any questions regarding how these changes may affect your individual taxes, please feel free to contact O'Connor & Drew to find out more information.

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About Us

O'Connor & Drew, P.C., founded in 1949, is one of the most well-respected, full-service accounting, tax and business consulting firms in New England that thrives on fostering close business and individual client relationships.

O'Connor & Drew P.C.
Certified Public Accountants