



For individuals and families, Weaver's tax compliance teams are prepared to help you paint your financial masterpiece with assistance on your tax return planning, preparation and consulting. We work hard to help you find every opportunity to minimize your tax liabilities and maximize your savings. At Weaver, we operate with a personalized approach, exceptional service and attention to detail. Our focus includes:

**Tax Return Preparation**

Our tax compliance teams maintain your federal, state, local, and international filing obligations to avoid costly interest and penalties. We keep abreast of all critical tax legislation and developments to help you identify and utilize all available credits and deductions.

**Year End Tax Planning**

Effective tax planning can not only eliminate tax liability surprises but can give you more insight into your overall financial planning picture. Both of these things allow you to more effectively plan for both short- and long-term financial success. Weaver's tax planning professionals work with you periodically throughout the year to identify and implement tax saving opportunities. Our holistic approach to planning focuses on both near- and far-range issues to help you achieve your financial planning goals.

**IRS & State/  
Local Dispute Representation**

Responding to a formal exam from a federal, state or local taxing authority can be a lengthy and grueling process that can be a significant drain on your time and resources. Weaver's experienced tax professionals can represent and navigate you throughout the dispute resolution process. We can assist you in preparing responses to the challenging authority and can arrange to meet and negotiate with the appropriate authority on your behalf, saving you time and giving you peace of mind.

**IRA Contributions  
& Distribution Planning**

An important component of tax planning for individuals involves the strategic use of Individual Retirement Account (IRA) contributions in combination with—or instead of—employer-sponsored retirement plans. Weaver's tax planning team works with you to calculate the most advantageous IRA option that reduces your tax liabilities today and in the future.

**Additional Tax Consulting Services**

- Federal, state, local, and foreign tax credit reviews and planning
- Trust and estate tax return preparation and planning
- Loss utilization reviews and planning



# CREATING YOUR FINANCIAL MASTERPIECE

