

Tax Solutions for Individuals

Strategically Build Wealth

Create a Tax Plan

An often overlooked planning tool is to create a tax plan, and it's never too early or late to start one. Taxes are controllable items and are the result of income, which is predictable or can be forecasted. A tax plan allows you to review the impact of all of your investments and provide a more accurate overall picture of your net worth.

Tax Services for Individuals Include:

- Tax Planning & Return Preparation
- Estate, Trusts & Gifting Strategies
- College Planning & Retirement Strategies
- Financial Analysis & Projections
- Second Home Purchases
- Major Asset Decisions
- Exercise Stock Option Strategies
- Divorce & Support Issues
- Buying & Selling a Business

Build and Transfer Wealth Using Time

Long-term tax planning involves accumulating income for decades while deferring the related tax liability. Deferring the tax liability involves delaying the tax payment until later in life, when you're projected to earn less and will be taxed at a lower rate. Time also helps with gifting strategies by allowing a donor to transfer wealth annually, reduce taxable income and enable financial resources to be shifted to anyone they wish. There are annual gifting limits, which is why having time to implement a strategy can be an effective wealth retention and wealth transfer tool.

Providing Peace of Mind

We want to eliminate financial surprises in your life. JGD professionals remain current on changing tax rules, regulations and wealth-building strategies. Our advisors have extensive experience assisting clients who want to be more proactive in planning their finances.



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