"The difference between death and taxes is death doesn't get worse every time Congress meets."

—Will Rogers, Actor

At MFMC, we strongly believe that incorporating your tax situation into your financial planning is vital in order to make sound decisions relative to your financial goals. We offer the following tax services to individuals, businesses, estates and trusts:

- **Tax planning:** Our team analyzes your tax situation on a yearly basis, generally in the autumn season, to allow time to make and execute the tax planning decisions that are optimal for your situation. We analyze "what ifs" to help you make decisions, regarding issues such as:

- Timing of when to recognize income and deductions;
- Capital gain/loss planning;
- "Bunching" Itemized Deductions versus the Standard Deduction;
- Stock Option planning;
- Alternative Minimum Tax (AMT) planning;
- The best time to begin receiving Social Security benefits;
- Minimum Required Distribution (MRD) computing and timing;
- Marital status change planning;
- Charitable gifting planning and implementation (including gift tax return preparation);
- Employment status planning;
- Matrimonial settlements;
- Investment implementation to maintain consistency with tax plans

- **Tax return preparation:** Our proactive team of knowledgeable, experienced, and highly skilled Certified Public Accountants (CPAs), Enrolled Agents (EAs) and Registered Tax Return Preparers (RTRPs) strives to prepare accurate returns, while maximizing the many complex tax deductions and tax credits that are available. A CPA or an EA completes a final review of your return to ensure accuracy.

- **Tax notice responses:** Did you receive a Federal or State tax notice? We take care of it for you!
- **Tax audit representation:** Our team of experienced CPAs and EAs represent you in case of a tax audit. Leave your worries to us!