

REAL ESTATE DEVELOPMENT & INVESTMENT



Taxation of real estate is one of the most complex areas of the tax code. Depreciation rules change regularly and an improper set up of asset acquisitions can significantly delay or even lose depreciation deductions. The consequences of good or poor tax planning can make or break a project.

We have more than 70 years of experience in dealing with all aspects of real estate planning and taxation, from setting up a simple rental investment to handling a multi-phase, multi-entity, multi-year, and multi-million-dollar real estate development.

Tax Services

- Income tax return preparation and filing, including multi-state taxes
- Like kind (1031) exchange
- Capital asset planning and strategy
- Investor/developer strategy
- Cost segregation studies
- Depreciation schedules, including depreciation options and elections
- Tax planning
- IRS audit support

Consulting Services

- Business planning, financial projections, and budgets
- Business valuations
- Selling, exchanging, and/or developing real estate
- Entity set-up and organizational structure
- Cash flow management
- Project benefits, including development of assets list and project indirect costs allocation

Client Accounting Services

- Business process outsourcing, including bookkeeping, billpay, and payroll processing, filings, and reporting
- Financial statements, reporting, and management reports
- Set up, training, and consulting for QuickBooks® software
- Advisory services on general ledger set-up and internal controls
- Virtual controller outsource and consulting
- Virtual CFO outsource and consulting

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Audit & Assurance

- Financial statement audits, reviews, and compilations
- Financial statements for bonding or governmental contract purposes
- Operational audits
- Internal control reviews
- Employee benefit plan audits
- Fraud investigations and risk management
- Agreed-upon procedures
- Forensic accounting, consulting, and litigation support services



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CPAs and Business Advisors

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