

# WHITLEY PENN SERVICES TO TAX & CONSULTING

Whitley Penn's tax and consulting practice encompasses a diverse group of individuals working as a team to develop practical tax plans and strategies for clients from small businesses to large corporations.

Many of the tax professionals at Whitley Penn have international firm experience while others have worked in private industry.



The experience of the individuals at Whitley Penn puts the firm in a unique position to provide the tax and industry knowledge and experience expected of an international firm coupled with the service expected of a local firm. In addition, Whitley Penn offers a practical viewpoint that gives consideration not only to tax planning issues, but also the business and industry specific issues facing its client

## A Full Service Approach to Your Tax and Consulting Needs

Whitley Penn provides comprehensive tax service that works to integrate its client's tax strategies with the other services provided by the firm. An integral part of this approach is the proactive communication and coordination between the firm's tax professionals with the professionals in the firm's other groups, including financial services, assurance and advisory services, employee benefit plan services, and valuation and litigation support. This approach is critical to ensuring that a transaction is not analyzed in isolation for only the effect on a client's tax position, but instead for the effect on all disciplines related to that transaction.

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For More Information, Contact:

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Whitley Penn has consistently been named among the top 25 firms in the country by *INSIDE Public Accounting*. We believe our success has been accomplished by focusing on the quality of our services and developing a quality team of professionals. Our culture of growth has allowed us to minimize professional staff turnover, which allows us to fulfill our commitment to staff continuity to our clients.



### An Integral Part of the Client's Decision Making Team

Another key aspect of Whitley Penn's client service oriented approach is proactive communication with its clients and their decision making personnel. Whitley Penn's frequent and timely communication with its clients provides a team oriented proactive decision making approach rather than a one sided reactive approach. By communicating frequently with its clients and other firm professionals, Whitley Penn's tax advisors are able to analyze the applicable industry, economic, regulatory and tax issues during the formative stages of the decision making process. This approach is integral in helping Whitley Penn's tax advisors work as a team with its clients to make critical decisions and structure transactions that consider not only the tax aspects of those transactions, but also the overall economic and operational effect of those transactions.

### Full Service Tax Practice

Whitley Penn offers a full service tax practice and provides a wide variety of services. The diverse experience and knowledge of its tax professionals allows Whitley Penn to work with its clients to provide a comprehensive and practical tax plan and strategy. A list of some of tax services provided by Whitley Penn include:

- Federal Income Tax Planning, Tax Consulting, and Compliance
- Entrepreneurial Services and Business Consulting
- Small Business Tax Services
- Corporation Tax Services
- International Tax Aspects of U.S. Businesses
- State and Local Taxation, Compliance, and Planning
- Estate, Gift, and Trust Income Taxation, Compliance, and Planning
- Estate Tax Planning and Consulting
- Business Succession Planning
- Mergers and Acquisition Due Diligence and Planning
- Business Structure Planning and Consulting
- Financial Statement Tax Provision (ASC 740) Preparation and Review
- Compensation Planning
- IRS Controversy
- State and Local Tax Controversy
- Non-profit Compliance and Consulting
- Employee Benefit Plan Compliance and Consulting

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