High Net Worth Individuals

At SingerLewak we know the importance of relationships in serving High Net Worth individuals and meeting their needs for financial controls, stability and simplicity. We have extensive experience providing business management and tax services to High Net Worth individuals, their families and family businesses.

Our experience and reputation has been established through long-term relationships, buildings a high level of transparency, and trust. Clients receive full reporting of our activities and the financial assets with which we are entrusted. Our high net worth individuals specialty group provides concierge style services designed to deliver financial security to clients through the knowledge that the complex details are in the hands of their trusted advisors.

We team with our client's other trusted advisors to ensure the wealth management and preservation strategies meet our clients' goals and objectives.

SPECIALIZED SERVICES OFFERED TO OUR HIGH NET WORTH INDIVIDUALS INCLUDE:

- Business management services
- Income tax planning, compliance and consulting services
- Financial reports and bookkeeping services
- Charitable giving
- Succession planning
- Estate planning
- Analysis of business transactions
- Insurance analysis and risk management
- Business valuations

SingerLewak
Accountants & Consultants

WWW.SINGERLEWAK.COM | 877.754.4557

The Skills You Need:

Extensive experience with high net worth individuals in the following areas:

- Entertainment
- Corporate
- Entrepreneurs
- Trust fund
- Real estate
- Sports
- Gaming

Our Business Management practice provides for:

- Assurance Services
- Income Tax Planning and Preparation
- Financial Planning
- Compensation Planning
- Retirement Planning

Our Tax services include:

- Tax planning, compliance and consulting services for individuals, businesses, estates and trusts
- Estate and gift planning
- Retirement planning
- Foreign asset disclosure reports
- Court accounting

The Service You Expect:

We provide a robust and wide range of services for our high net worth individuals, and our national reputation in the Professional Services community (i.e. bankers, attorneys, money managers, insurance brokers, etc.) is unparalleled. We have the networks and ability to always bring in the right professionals to service each client.

We understand the need to be cost-effective:

- We create fee structures based on our clients' needs and a customized relation-ship plan
- We build payment plans that address our clients' cash flow needs.