



SingerLewak

Accountants & Consultants



Phase 1

Review of Current Status

- Conduct interviews to understand: current business model, products and services offered, production and distribution, local, national and international markets where business is conducted, tax risk profile and future plans.
- Review of original and amended income, sales & use, and other tax returns for the current and two prior years.
- Review of current and prior IRS and state tax exams, effective tax rates, and review of uncertain tax positions.
- Review of prior acquisitions and dispositions with particular emphasis on structure, impact and other tax consequences.



Phase 2

Development & Design

- Identification of unresolved tax issues, errors, and refund opportunities.
- Where multiple operating jurisdictions are involved, model the optimum tax structure(s).
- Using analytical tax tools, checklists, and taking into account the Company's risk profile, identify tax positions to defer or reduce current taxes.
- If effective tax rate is important, such as in the case with public companies, identify structural changes to achieve current and deferred tax rate arbitrage savings.



Phase 3

Recommendations

- Meet with Ownership and Management and present findings, recommendations and options.
- Implement agreed upon recommendations.

Tax Diagnostic Review Process



Tax Laws are Ever Changing

The tax laws are ever changing; our Tax Diagnostic, with regular annual reviews, ensure you and your Company are maximizing deduction and credits.

At SingerLewak, we want to be your trusted advisor. We understand everyone has unique circumstances. Our Tax Diagnostic Review Process is designed to apply our many years of experiences to your situation. The result will be an honest, in depth study providing you with a better understanding of your tax situation.



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