



INDIVIDUALS

A Client Service Group by SingerLewak

INDIVIDUALS

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

Experience and Reputation

Our experience and reputation has been established through long-term relationships and building a high level of transparency and trust. Our Individuals client service 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.

Specialized Individual Services

- ✓ Income Tax Planning and Preparation
- ✓ Business Management
- ✓ Estate Planning
- ✓ Financial Reports and Bookkeeping Services
- ✓ Analysis of Business Transactions
- ✓ Succession Planning
- ✓ Charitable Giving
- ✓ Retirement Planning
- ✓ Insurance Analysis and Risk Management
- ✓ Litigation Support Consulting
- ✓ Business Valuations

Proven Expertise Across These Key Industries

- Entertainment
- Corporate
- Entrepreneurs
- Trust Fund
- Real Estate

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 structure based on our clients' needs and a customized relationship plan
- ✓ We build payment plans that address our clients' cash flow needs

