

Personal Financial Services Group

Specialty groups with special know-how.

While we serve clients in a wide variety of industries, Elliott Davis delivers broader and deeper resources through groups that focus on specific industries. We leverage our information, people and experience to deliver accounting and business advisory services in ways only a specialized team can. These groups are led by shareholders who not only provide vision, but are involved in your day-to-day activities, challenges and solutions.

For more information about the Elliott Davis Personal Financial Group, please call 800-503-4721, or email info@elliottdavis.com.

www.elliottdavis.com

ElliottDavis
Accountants and Business Advisors

Strength in numbers.



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The Personal Financial Services Group at Elliott Davis is committed to helping individuals and families effectively manage their overall personal financial situation through income and estate planning and related compliance services. We can assist you in meeting your financial goals and achieving peace of mind.

Our team is comprised of a group of professionals dedicated to meeting the needs of individuals with personal attention and sound advice. When you engage our services, you have access to a team with in-depth experience in the following areas:

Individual Income Tax Planning and Compliance

- *Annual tax projections*
- *Quarterly estimated tax payment review*
- *State income tax planning*
- *Planning for retirement and education funding*
- *Preparation of Federal and state income tax returns*

Planning for the Closely-held Family Business

- *Succession planning*
- *Tax and cash flow planning for the business owner*
- *Compensation planning*

Philanthropic Planning

- *Identification of charitable vehicles such as charitable remainder and lead trusts, private foundations, and donor advised funds*
- *Assistance with implementation of giving plan*
- *Evaluation of income and estate tax implications and savings*

Family Office Services

- *Coordination of legal and investment services*
- *Facilitation of family wealth and tax planning meetings*

- *Bookkeeping and accounting services*
- *Bill payment and household employee payroll service*

Estate Planning and Compliance

- *Preparation of a comprehensive estate plan*
- *Coordination of other professional advisors*
- *Implementation and periodic review of estate plan*
- *Wealth transfer planning and monitoring*

Trust and Estate Administration

- *Probate administration filings*
- *Estate and fiduciary tax compliance*
- *Trust funding analysis and assistance*

The Personal Financial Services Group also works with our other Elliott Davis affiliates, including Accounting Resources, Retirement Plan Advantage and Wealth Management. The integration of our services with these affiliates gives you one point of contact to leverage a variety of skills and resources to achieve your unique goals.

