DZH PHILLIPS

Certified Public Accountants & Advisors

HIGH NET-WORTH

High net-worth individuals need an advisor that will align with their needs, proactively provide solutions, and help navigate pressing issues.

You have numerous concerns that come up all year long–not just at tax time–and we're here to help. As high net-worth clients make up a significant portion of our client base, the DZH Phillips advisors are deeply familiar with the issues facing you and your related entities, including:

- Entrepreneurs and founders
- Private equity partners
- Corporate executives

Among other services, our team can advise you regarding:

- Business and income tax planning
- Estate and gift planning and wealth transfer techniques
- Charitable gifting and philanthropic strategies
- Retirement and employee benefit planning
- Business valuation and succession planning
- Family office support and related accounting services
- Tax controversy services
- Multi-state and international tax services
- Tax credits and incentives

We bring you creative strategies and take the time to get to know your needs so that we can better understand both your business and personal strategies and goals.

For More Information, Contact:

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