

TAX SERVICES FOR INDIVIDUALS

ABOUT US

Since 1926, Windes has been a trusted business partner to our Clients. We have earned our reputation as one of the most respected and socially responsible accounting firms in southern California. Our professionals deliver high-value accounting and consulting services and are committed to our clients. The strength of our practice and comprehensive expertise, coupled with our global network, enables us to provide solutions to our clients at fees that represent outstanding value. Windes offers a multitude of services from more than 200 professionals in our three southern California offices. Our firm serves over 3,900 individuals and more than 4,000 businesses. Our estate and trust practice can assist with wealth management and conservation of your estate by minimizing tax liabilities, focusing on the preservation of wealth and the interrelationship of the estate, fiduciary, and personal taxes.



THE WINDES APPROACH

The majority of our clients are acquired through referrals from existing clients, friends, or business associates of the firm. Many of our client relationships have lasted for generations. Significant partner involvement and low personnel turnover are keys to our success. Given our local decision-making, we are able to deliver our engagement services to meet your needs without using a one-size-fits-all approach.

THE WINDES DIFFERENCE

- ◆ Technical expertise in a variety of industries and specialty niches
- ◆ Strengths focused on the needs of our clients
- ◆ Established in 1926, we have been serving clients for over nine decades
- ◆ Strong client relationships and exceptional service
- ◆ A combination of national firm technical expertise with the responsiveness, rate structure, and dedication to client satisfaction that makes our services an outstanding value
- ◆ Global Reach: Our Allinial Global association provides cultural knowledge, expertise, and resources in 105 countries worldwide and is the second largest accounting association in the world
- ◆ A separate third-party administration practice with accredited retirement plan experts on staff
- ◆ Acknowledged by *Inside Public Accounting (IPA)* as one of the top “25 Best of the Best” accounting firms in the country and listed as one of *IPA*’s “All-Star Firms for Long-Range Planning”
- ◆ Motivated and hard-working staff: Consistently ranked as one of the “Best Firms to Work For” in the country by *Accounting Today* and a “Best Places to Work” in Los Angeles and Orange Counties by the *Los Angeles* and *Orange County Business Journals*, respectively

INDIVIDUAL TAX RETURN PREPARATION

Life can be full of surprises. Unexpected events and changes often result in individual tax return consequences. Windes can help you manage these changes and turn them into new possibilities with our individual tax return preparation and filing services. We will work with you to minimize your tax exposure and help you meet your tax and wealth accumulation goals. Our services for individuals include:

- ◆ Tax preparation, filing, and returns
- ◆ Alternative minimum tax planning
- ◆ Annual income tax planning
- ◆ Charitable giving and investment strategies
- ◆ Estate, gift, and trust planning
- ◆ Tax-free exchanges
- ◆ Bookkeeping (remote and on-site)
- ◆ Monthly bank reconciliation statements for management

MEMBERS OF

- ◆ American Institute of Certified Public Accountants (AICPA)
 - Center for Audit Quality (CAQ)
 - Governmental Audit Quality Center (GAQC)
 - Employee Benefit Plan Audit Quality Center (EBPAQC)
 - Private Companies Practice Section (PCPS)
- ◆ American Society of Pension Professionals and Actuaries
- ◆ California Society of Certified Public Accountants (CalCPA)
- ◆ National Institute of Pension Administrators
- ◆ The ESOP Association
- ◆ The National Center for Employee Ownership
- ◆ Western Pension & Benefits Council, Orange County

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