



PLANNING YOUR APPROACH. ALWAYS.


BatesCarter
Exceeding expectations. Always.

**YOU WANT TO PRESERVE
YOUR WEALTH.**



**BATESCARTER CAN HELP WITH
AN ASSERTIVE TAX STRATEGY.**

You work hard for your money. Naturally, you want to keep as much of it as possible. We understand.

BatesCarter provides taxation services for individuals, corporations, partnerships, estates and trusts — both foreign and domestic. Not only can we help you minimize your current tax burden, we can also assess your long-term tax threats to create a tax strategy that will help you protect your assets far into the future.

A PROACTIVE APPROACH.

We take your tax position personally. We like nothing more than digging deep to find deductions, credits and other tax savings. Of course, our tax work is technically proficient and as assertive as possible on your behalf. Our goal is to make sure that you don't pay a penny more than you owe, using every general and industry-specific tax break available.

We proactively assess your tax situation and come to you with ideas on how to reduce your tax liability and avoid the tax traps that exist for every taxpayer. Whether your tax issues are simple or complex, BatesCarter can handle them. Our entire tax team stays abreast of the latest tax legislation and regulations through tax

seminars and classes, daily tax updates, writing articles and reading professional journals. Our clients benefit from our real interest in the ever-evolving tax law.

A PROGRESSIVE PLAN.

We don't disappear after tax season. Because we have such long-term relationships with our clients, ongoing tax consulting is a natural extension of our work. In addition to income tax return preparation, BatesCarter offers consulting and implementation services, for estate tax, charitable giving, and business succession plans.

Our comprehensive strategies address compensation, tax-free benefits, retirement plans, and business exit scenarios to help you achieve your lifetime financial goals. We offer the follow-through necessary to put into place the mechanisms that make our strategies work for businesses and the individuals that make them profitable.

In the end, more of what you have earned will be available for the benefit of your business, family and community for years to come. When it comes to taxation, we are on your side. We are planning your approach. Always.

THE BATESCARTER DIFFERENCE

OUR CLIENTS WILL TELL YOU THAT THE REAL BATESCARTER DIFFERENCE IS NOT SO MUCH WHAT WE DO, BUT HOW WE DO IT — WITH INTEGRITY, CREATIVITY AND ATTENTION TO DETAIL. WE DELIVER EXCEPTIONAL SERVICE AT GREAT VALUE.

BATESCARTER'S SERVICES:

AUDIT AND ASSURANCE

TAX SERVICES

ADVISORY AND CONSULTING SERVICES

BUSINESS VALUATION

LITIGATION SUPPORT

GOVERNMENTAL ACCOUNTING
SERVICES

EMPLOYEE BENEFIT PLAN AUDITS

NOT-FOR-PROFIT ACCOUNTING AND
COMPLIANCE

BATESCARTER IS A FULL-SERVICE CPA AND BUSINESS ADVISORY FIRM, OFFERING ACCOUNTING, AUDIT, TAX AND ADVISORY SERVICES TO PRIVATELY HELD BUSINESSES, GOVERNMENT ENTITIES, NOT-FOR-PROFITS AND INDIVIDUALS SINCE 1962.

EXCEPTIONAL SERVICE IS OUR HALLMARK. WE STRIVE FOR EXCELLENCE IN ALL WE DO. WE BELIEVE IN EXCEEDING CLIENTS' EXPECTATIONS. ALWAYS.



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