

Learn how we reduced one client's income tax compliance costs by over 25%

CASE STUDY

Our team has a proven track record assisting our clients in increasing EBITDA and/or cash flow.

During a recent engagement assisting a client with evaluating a portfolio company we identified planning opportunities creating over \$2,000,000 per year of tax benefit and generating over \$500,000 of tax refunds. Planning opportunities included restructuring business operations to more appropriately manage income and expense items, resulting in reduced state income and sales/use taxes. From a refund perspective we identified federal and state income tax credits that our client was entitled to but that were never taken by it on tax returns.

Using our disciplined approach, we worked with this client to reduce its income tax compliance costs by over 25%, freeing up additional capital for strategic growth initiatives.

OUR SERVICES: True to our name, we are passionate about client advocacy. Our experience combined with the benefit of technical problem-solving skills help us to provide intelligent tax advice.

Businesses from multinational corporations to owner-operated companies have come to count on us for customized, intelligent guidance that demonstrates our understanding of the challenges and opportunities they face.

- [Transaction Services](#)
- [Tax Planning for the Fund](#)
- [Portfolio Company Services](#)

OUR TEAM

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