



**TruePartners**<sup>SM</sup>  
CONSULTING

Intelligent Tax Advice

Private Equity Services

# Our Company



**Countless years of tax and financial experience, offices located across the nation with ongoing expansion, a fresh and collaborative approach to tax consulting and ready to discover a world of possibilities.**

- True Partners Consulting is a tax and business advisory firm that combines a fresh approach to tax services with well-known expertise.
- TPC serves as its clients' advocate. TPC's employees combine passion and talent with intelligent problem solving to help each client realize their financial goals.
- TPC provides an atmosphere for its employees that celebrates and promotes collaboration, responsiveness and innovation.

**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.**

---

## **CLIENT BENEFITS TO HIRING TRUE PARTNERS CONSULTING:**

- Senior level tax consulting talent
  - Quality client service
  - Technical tax advisory expertise
  - Streamlined cost structure with experienced professionals
  - Independent tax advice without audit conflicts
- 

## **PRIVATE EQUITY SERVICES**

As a private equity fund that regularly makes acquisitions, manages, and reorganizes acquired businesses, or disposes of invested companies, the issues you face are complex. Tax planning, at the earliest stage of these activities, is critical to minimizing federal and state taxes while maintaining flexibility to benefit from future tax planning.

True Partners has extensive experience in providing tax advice to equity funds in all aspects of their operations. Our experts can assist you in selecting the most effective tax strategies to achieve your overall business objectives.

# Our Services

## **TRANSACTION PLANNING**

### **Acquisitions**

- Perform tax due diligence
- Develop structures that minimize the overall tax burden of the transaction
- Negotiate state and local credit and incentive packages
- Analyze historic sales and use, property and employment tax filings for opportunities and exposures
- Identify unclaimed property opportunities and exposures

### **Dispositions**

- Advise on potential exit strategies
- Assist in IPO preparations, including restructuring business operations
- SOx compliance
- Accounting for income taxes
- Provide assistance in tax due diligence requests
- Review all transaction documentation

## **TAX PLANNING FOR THE FUND**

- Provide assistance in structuring partnership agreements
- Provide tax structuring and planning
- Structuring partner incentive compensation
- Review or prepare all fund income tax returns
- Planning in connection with tax withholding requirements
- Tax structuring and planning on potential UBTI issues



# Our People

Considered to be one of the fastest growing tax consulting firms in the United States, our firm is currently staffed with highly skilled, progressive thinkers who are motivated to be leaders in their field. Our staff includes attorneys, CPAs and other tax designations such as enrolled agents, Certified Payroll Practitioners and Certified Members of the Institute for Professionals in Taxation, most with at least 10 years of experience.

---

- Having backgrounds with top financial firms, the professionals at True Partners Consulting are equipped with the talent and commitment to deliver intelligent advice that advances our clients' interests.
- Led by proven expertise and founded on strong work ethics, True Partners Consulting encourages our employees to work side by side with senior level talent to provide the best possible service to our clients.
- Our consultants are experienced professionals with a passion for solving tax and tax related business problems. Their experience and ongoing training equip them to provide current, technical thinking.

## PRIVATE EQUITY SERVICES TEAM

### CHICAGO

|                     |              |                             |
|---------------------|--------------|-----------------------------|
| Robert J. McDonald  | 312.924.3219 | robert.mcdonald@TPCtax.com  |
| Stanley W. Jozefiak | 312.235.3306 | stanley.jozefiak@TPCtax.com |

### NEW YORK

|               |              |                       |
|---------------|--------------|-----------------------|
| John V. Aksak | 631.777.6310 | john.aksak@TPCtax.com |
|---------------|--------------|-----------------------|

### SAN JOSE

|             |              |                        |
|-------------|--------------|------------------------|
| Louis Gomes | 408.625.5099 | louis.gomes@TPCtax.com |
|-------------|--------------|------------------------|

# Our Approach



**Building trusting and long-lasting relationships through experience, intelligent problem solving and a passion for the possible.**

---

- What sets True Partners Consulting apart is our unparalleled level of partnership and support. Our employees focus on getting to know our clients inside and out so they can build long-lasting relationships and work to meet specific tax and business advisory needs.
- Free of potential Sarbanes-Oxley related conflicts, True Partners Consulting offers the benefit of fresh thinking that's setting new standards in the tax and financial advisory field. True Partners Consulting has the Big Four technical training and expertise without the bureaucracy and hierarchy of a traditional accounting firm.

## **PORTFOLIO COMPANY SERVICES**

Subsequent to an acquisition, day-to-day tax management of a portfolio company can be burdensome and costly. True Partners offers a complete range of tax and related services and is able to assist companies throughout the entire life cycle of their business.

- Business entity structuring
- Provide innovative and comprehensive tax planning opportunities
- Implementation of tax planning opportunities
- Tax accounting methods
- Assist in structuring the tax department
- FIN 48 analysis
- Accounting for income taxes
- SOx compliance and remediation efforts
- Review and/or prepare all income, sales/use, property tax and unclaimed property returns
- Identify income, sales/use, employment, and property tax refund opportunities
- Assist with audits of all previously filed tax returns
- Advise on potential exit strategies and tax efficient structures
- Negotiate state and local credit and incentive packages

Please visit our website for additional information.

**[www.TPCtax.com](http://www.TPCtax.com)**

# Our Locations

## **BOSTON**

225 Franklin St., 26th Floor  
Boston, MA 02110  
P: 617.217.2066  
F: 631.777.6382  
E: Connect@TPCtax.com

## **CHICAGO**

225 W. Wacker Dr., Suite 1600  
Chicago, IL 60606  
P: 312.235.3300  
F: 312.235.3350  
E: Connect@TPCtax.com

## **LOS ANGELES**

633 W. Fifth St., 62nd floor  
Los Angeles, CA 90071  
P: 213.417.2500  
F: 213.417.2550  
E: Connect@TPCtax.com

## **NEW YORK**

145 Pinelawn Road  
Suite 350 North  
Melville, NY 11747  
P: 631.777.6300  
F: 631.777.6350  
E: Connect@TPCtax.com

## **SAN JOSE**

150 Almaden Blvd., Suite 450  
San Jose, CA 95113  
P: 408.625.5100  
F: 408.625.5125  
E: Connect@TPCtax.com

## **TAMPA**

400 N. Ashley Drive, Suite 1600  
Tampa, FL 33602  
P: 813.434.4000  
F: 813.434.4050  
E: Connect@TPCtax.com

## **LONDON**

**True Partners  
Consulting (UK) LLP**  
68 Lombard Street  
London, EC3V 9LJ  
P: +44 (0)20 7868 2435  
F: +44 (0)20 7868 1800  
W: www.tpctax.co.uk

## **AMSTERDAM**

**Brandt & Partners  
Belastingadviseurs B.V.\***  
Prinseneiland 55 - G  
1013 LM Amsterdam  
The Netherlands  
P: +31 (0)20 777 40 45  
F: +31 8 473 473 02  
W: www.brandtenpartners.nl

## **BARCELONA**

**Toda & Nel-lo Abogados\***  
Avenida Diagonal, 497, 1<sup>o</sup>  
08029 Barcelona, Spain  
P: 0034 933634000  
W: www.todanel-lo.com

## **FRANKFURT**

**RP Richter & Partner\***  
Taususanlage 19  
60325 Frankfurt / Germany  
P: +49 (0) 69 71 91 60 - 0  
F: +49 (0) 69 71 91 60 - 100  
W: www.rp-richter.de

## **MUNICH**

**RP Richter & Partner\***  
Nymphenburger Straße 3b  
80335 Munich / Germany  
P: +49 (0) 89 55 0 66 - 0  
F: +49 (0) 89 55 0 66 - 100  
W: www.rp-richter.de

## **STUTTGART**

**RP Richter & Partner\***  
Bolzstraße 3  
70173 Stuttgart / Germany  
P: +49 (0) 711 222 158 - 30  
F: +49 (0) 711 222 158 - 99  
W: www.rp-richter.de

## **PARIS**

**ArtemTax International\***  
11 rue de Téhéran  
75008 Paris  
P: 33 (0) 1.56.88.32.60  
F: 33 (0) 1.56.88.01.90  
W: www.artemtax.fr

## **TORINO**

**Studio Manzoni Pagliero  
Vanz e Associati\***  
via Avogadro n. 12/a  
10121 Torino Italia  
P: 0039 011 5567222  
F: 0039 011 5567252

## **BEIJING**

**True Partners Consulting  
International (China) Co., Ltd.**  
上海攀盟商务咨询有限公司\*  
508 Tower A, Kunsha Centre  
16 Xinyuanli, Chaoyang District  
Beijing 100027, China  
P: 010 8468 2688 ext. 101

## **HONG KONG**

**Michael Yam & Company\***  
23/F Wing Hang Finance Centre  
60 Gloucester Road  
Wanchai  
Hong Kong  
P: (852) 25299301  
F: (852) 25297920

## **SINGAPORE**

**HLS Tax Advisory  
Services Pte Ltd.\***  
15 Hoe Chiang Road  
#12-02 Tower Fifteen  
Singapore 089316  
P: (65) 6423 9969  
F: (65) 6423 9979  
W: www.hlsco.com

\* Member firms of the True Partners Consulting International Network not owned nor controlled by True Partners Consulting LLC.

A World of Possibilities.



**TruePartners**<sup>SM</sup>  
CONSULTING

Intelligent Tax Advice

[www.TPCtax.com](http://www.TPCtax.com)