



# **Tax Expertise for Individuals & Businesses**

Smart Solutions for Every Tax Need



## Our Services

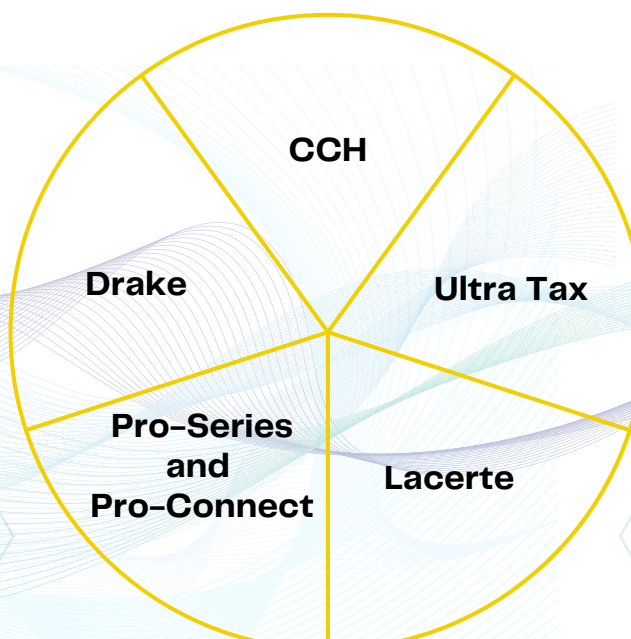
Individuals,  
Partnership Firms,  
Corporates (C Corp  
and S Corp), Non-  
Profit Organizations,  
Estates and Trust,  
SALT

Compliance with  
fiduciary  
accounting  
standards

Detailed  
working papers  
to reconcile  
GAAP and Tax  
books

Specialized  
industry  
knowledge on  
cannabis sector  
(section 280E,  
471c)

## Software & Tools



# Overview

## Individual Returns (Form 1040 and Form 1040NR)

- Providing services to variety of Individuals including HNIs, Investors, Families and Individuals
- Advice on tax planning opportunities
- Capable of handling Notices
- K-1 and Basis Worksheets

## Business Returns (Form 1065, 1120, 1120S)

- Pass-through taxation; multi-state S corp filings (15+ states)
- Consolidated returns; accrual-to-cash adjustments
- Complex Sec. 263A, 481(a), 163(j) calculations
- K-2/K-3, 5471, 5472 for cross-border compliance
- Special allocations, Schedule K-1s
- M-1/M-2 adjustments; retained earnings tie-outs

## Fiduciary Returns for Estates & Trusts (Form 1041)

- Identifying the Income/Losses on trust return and capturing them as part of Individual returns
- Have a set of experienced staff to handle complex Trust and Estate returns
- Compliance with fiduciary accounting standards

## Nonprofit & Tax-Exempt Returns (Form 990)

- Dedicated team to work on Form 990 to help clients related to Charity or Non profits.

## State and Local Tax Compliance (SALT)

- Multi-state income apportionment and nexus assessments
- Expertise across states with flat, progressive, or no income tax

## Additional Services

- Communicating with IRS and supporting CPA's
- Calculating Estimates
- Filing Tax returns with EFIN
- Filing Extensions
- Direct client communication
- Good record in clearing the diagnostics

## Tax Growth

Year	2021	2023	2025 (As on March 31)
No of clients	1	5	7
Total returns			
1040	25	45	247
1120S		27	120
1065		12	344
1120		7	50
1041			39
990+SALT			10
TOTAL	25	91	810

# Team Structure

	2023	2025	Qualifieds EA's / CPA
Senior Managers / Managers		3	
Seniors		7	
Staffs	4	13	5
Contractor	3	1	1
Total	7	24	6

## Tax Leads



**Swati Gupta**

MBA

10 Years of Experience



**Ankit Sharma**

CS, CA Finalist

9 years of Experience



**Dinesh Munaga**

B.Tech

7 Years of Experience



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