



tax planning + strategies





tax advice that saves you money

Saving money. That's the bottom line on taxes.

And while many CPAs can prepare a tax return, we can provide the crucial guidance and expertise you need to implement an overall tax strategy that not only minimizes your tax burden but also maximizes your business and financial goals.

At Cotton + Allen, we believe in the big picture. No tax decisions made in a vacuum. No unproven tactics. We approach your tax situation as if it were our own, with technical proficiency and an innovative, solution-driven attitude that pays off.

Cotton + Allen is a full-service firm with deep resources and technical know-how. Our tax team includes specialists in federal, state and local tax, as well as estate, gift and trust tax. Moreover, as a member of the RSM McGladrey Network, we give you access to the tax knowledge base of a national organization of more than 6,700 professionals in more than 300 locations.

business tax services

Yes, we prepare accurate, valid, supportable tax returns. But that is just one small piece of the overall service we provide our clients. Using thorough research and proactive planning, we work in partnership with you to define your optimal tax situation. We look at your company's various tax liabilities and work with you to create a strategy to reduce them, using alternative tax treatments and tools. Armed with a solid plan, we can help save you money in the long term.

Plus we can provide proactive tax advice on buying, selling or setting up a business. Structuring these deals correctly can prevent headaches—and save a lot of money—down the line.

state and local tax compliance

Often overlooked and under-addressed, state and local tax obligations can be troublesome for even the most careful companies. At Cotton + Allen, we are familiar with state and local tax compliance

**no one knows your business
expert advice you need to grow**

issues as well as the tax credits that may apply. We help clients untangle these complex requirements and manage them efficiently.

estate and gift tax planning

Navigating federal estate and gift tax laws is a challenge. Our estate and gift tax experts are attuned to the nuances of these laws and have access to the latest opinions and rulings in this area. We are dedicated to using the best estate and gift tax tools to protect your assets for future generations.

personal tax consulting

For many owners of privately held companies, business and personal tax situations are heavily intertwined. Because of our familiarity with your business tax situation, we are also able to provide insight and planning on the personal front.

Nobody likes paying taxes. But with Cotton + Allen as your trusted advisors, you can count on us to help you minimize your tax burden and preserve your wealth.

innovation.
dedication.
experience. the
legacy continues.

Cotton + Allen is a full-service accounting and advisory firm serving the region since 1921. As trusted advisors to our clients, our talents extend beyond traditional tax and accounting work to include a broad range of disciplines that address business and financial needs today and in the future.



Awarded honors for outstanding historic preservation, our business home in downtown Louisville's First Trust Centre is a testament to our firm's legacy.

like you do. but with cotton + allen as your trusted advisors, you can count on getting the
v your business, reduce your tax burden and preserve what you've worked so hard to build.

the right services

Cotton + Allen is a full-service accounting and advisory firm. We provide a range of services to meet your needs now and in the future:

audits, reviews + compilations

bookkeeping

budgeting + forecasting

business acquisition + disposition

business advice + planning

business valuation

employee benefit plans

estate + gift tax planning

financial planning + wealth management

information technology consulting

litigation support

outsourcing in accounting + tax

retirement plan design + administration

succession planning

tax planning + strategies

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a member of the rsm mcgladrey network

