



Some move vertically  
or horizontally...  
others move diagonally...  
with our advice,  
you will make  
the right move.



BERKOWITZ DICK POLLACK & BRANT  
CERTIFIED PUBLIC ACCOUNTANTS & CONSULTANTS, LLP

200 South Biscayne Boulevard  
Sixth Floor  
Miami, Florida 33131  
Telephone: 305-379-7000

515 East Las Olas Boulevard  
Fifteenth Floor  
Fort Lauderdale, Florida 33301  
Telephone: 954-712-7000

5100 Town Center Circle  
Suite 430  
Boca Raton, Florida 33486  
Telephone: 561-361-2000

Toll Free: 800-999-1CPA (1272)  
Email: [info@bdpb.com](mailto:info@bdpb.com)  
Website: [www.bdpb.com](http://www.bdpb.com)

## Tax Services



BERKOWITZ DICK POLLACK & BRANT  
CERTIFIED PUBLIC ACCOUNTANTS & CONSULTANTS, LLP

## Business Tax Solutions

From the sole-proprietorship to the public company, Berkowitz Dick Pollack & Brant provides effective business tax consulting regarding tax liability, specialized transactions (e.g. mergers and acquisitions) and long-range tax planning. The diversity of our clients requires us to understand organizational structures that may lead to recommendations for simplicity (e.g. liquidations of an entity) or complexity (e.g. formation of a subsidiary). Our tax compliance services include preparation of federal, state and local returns.

## Mergers and Acquisitions

We provide a full range of services in connection with mergers and acquisitions for both buyers and sellers. Our services include performance of due diligence, representation in negotiations, provisions of tax impact and planning analysis. Also, through our affiliate, BayBridge Capital Advisors, LLC/SM, we offer assistance in finding a prospective buyer or seller and identifying funding sources.

## Individual Tax Planning and Compliance

Many of our clients are entrepreneurs who own closely-held businesses, or high net-worth individuals who own significant investment portfolios. However, all client situations are as unique as the individuals we represent. Our tax, business and consulting expertise allow us to cater to each client's set of circumstances. Our goal is to assist in achieving clients personal financial goals, whether they are minimization of tax obligations or provision of information necessary to make proper planning decisions. This includes both current and long-term planning. Our tax compliance services include preparation of federal, state and local returns.



## Real Estate Taxation

Given the volatility of today's real estate market, developers, owners, property managers, construction companies and investors face several challenges trying to maintain cash flow, remain profitable and instill institutional confidence. At BDPB, we understand the business and operational issues impacting real estate companies in today's competitive market, and offer assistance designed to maximize profits and minimize income taxes. We offer assistance in the following areas:

- Tax structuring for complex deals
- Tax structuring for partnership and LLC agreements
- Planning to minimize income tax from forgiveness of debt
- Tax deferral strategies for sale transactions
- Foreign investment in real estate
- Tax compliance
- Multi-state tax compliance and consulting
- Tax-free exchanges
- Cost segregation services
- Maximizing expensing vs. capitalization of costs

## International Taxation

Berkowitz Dick Pollack & Brant is recognized as a leader in providing services related to international taxation. Services in this highly specialized area include inbound and outbound expertise in pre-immigration tax and estate planning, foreign investment in US real estate, foreign corporations doing business in the United States, US persons doing business abroad, taxation of foreign trusts, compliance services and IRS representation.

## Estate and Trust Planning and Compliance

We have a long history of assisting clients with their estate planning needs and goals, including succession planning for family owned businesses, utilization of trusts and other vehicles to minimize estate and gift taxes and other strategies designed to meet each family's estate planning goals. Whether your goals are to maintain privacy, minimize taxes on the transfer of assets and/or maintain certain assets within your family, our firm can help design and implement appropriate strategies.

## State and Local Taxation

Our tax professionals are well versed in both Florida state and local taxation as well as income/franchise and sales/use taxes for multi-state entities. We conduct nexus reviews and structural planning related to acquisitions dispositions, audit defense, tax compliance, and the application of technology for state and local tax purposes.

## Representation before Governmental Authorities

An audit by a taxing authority is never welcomed, always at the wrong time and usually very stressful. Our tax professionals have vast experience in such representation at federal, state and local levels to:

- Maximize the presentation of your facts
- Minimize your exposure to additional tax
- Minimize your personal exposure to the audit process

When the contact from a taxing authority takes place via correspondence, our experienced staff can help by working within the system and assisting in cutting through the red tape.

*For more information, contact Steve Messing at [smessing@bdpb.com](mailto:smessing@bdpb.com) or call (305) 379-5596.*