



Private Company Services

Income tax planning and compliance services for private companies and their owners

Ongoing legislative and regulatory changes, along with an increased tax authority focus on high-wealth individuals, create a demanding environment for private companies and owners to proactively manage their tax liabilities and risks. Deloitte is experienced in addressing the complex relationships among the private business enterprise, its owners, family offices, and employees of the business enterprise or family office. Deloitte helps private companies and their owners evaluate the potential tax consequences of various business and personal wealth decisions, keeping tax, business and personal objectives in mind. Deloitte can help explore tax-savings opportunities, prepare for changes in the tax and economic climate, and help resolve disputes with tax authorities.

Comprehensive owner and family wealth planning

Individuals and families with substantial assets often face difficult decisions associated with protecting and extending their legacy. Deloitte is experienced in addressing the many facets of wealth planning for private company owners and their families. Our professionals assist private business owners in exploring the issues relevant to wealth preservation and the transmission of wealth to future generations. Deloitte's estate tax planning specialists work closely with the private client's other professional advisors to address the complex issues involved in estate, gift, inheritance, trust, and charitable planning and to develop and implement an estate plan tailored to their needs.

International tax and estate planning

Increased mobility among high net-worth individuals and families has coincided with the broad expansion of a globally integrated economy — featuring greater cross-border trade and investment — to create an increasingly complex range of global tax issues. Deloitte professionals work closely with clients to address issues of tax residency and domicile and to assess the tax aspects of international investment opportunities. We provide multi-jurisdictional tax and estate planning advice, taking into consideration family mobility, wealth planning and preservation goals, the nuances of investing in specific countries and asset types, and the tax consequences to the family's private business enterprises.

Family office services

Effective family wealth management encompasses a range of issues related not only to business aims, but also personal and family goals. Wealthy families often consider establishing a family office to manage their many investment, reporting, philanthropic, and financial planning responsibilities. Properly structuring and staffing a family office requires an analysis of tax and governance considerations, as well as a deep understanding of the family's short and long range business and professional goals and objectives. Deloitte professionals can assist with family office design and set-up, family education and communications, charitable planning and private foundations, and structuring business investments. Our approach addresses both the family office as a business and the private client's family wealth as an ongoing enterprise.