GENCREST
CAPITAL PARTNERS

MINIMIZING EXPOSURE, OPTIMIZING FOR THE FUTURE.

Developing personalized tax strategies for affluent individuals and families.

At GenCrest Capital Partners, our experience gives us an intimate understanding of the sophisticated tax strategies needed by high-net-worth families. Minimizing current income taxes and planning for efficient wealth transfer creates unique challenges requiring higher-level tax knowledge and insight.

Our comprehensive tax planning expertise helps put your entire financial life into focus, allowing you to take fewer risks with your investment portfolio.

Planning for your broader goals while paying close attention to every detail.

Leveraging years of experience, high accreditation standards and the latest technology, our tax planning team works with you to create and manage a specialized tax strategy that fits your goals. This is about more than tax returns. This is planning for generations.

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Scan the code to request an appointment with our tax planning team.

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Frequently Asked Questions

Is tax planning just about filing tax returns?

We view tax return preparation as an ongoing cycle of reporting and planning, giving you confidence that your tax reporting is as accurate as possible. However, preparing your tax return is also our opportunity to start planning for the year ahead. By assisting you with tax return preparation, we gain valuable insight into complex planning opportunities for your overall financial outlook, including Roth Conversion strategies, charitable giving, harvesting tax losses and maximizing tax deductions and credits. Tax return services include reporting for individuals, trusts and estates, business entities and reportable gifts. We also specialize in tax reporting for individuals with self-employment income, rental income and pass-through businesses and investments.

Does GenCrest only help with personal tax strategies?

Our experienced tax planning team helps with personal and business tax strategies. As with many high-net-worth families, business tax strategies are a major consideration. In most cases, we provide tax planning as an integrated part of our holistic approach to serving our clients, which allows for a seamless, comprehensive experience that aligns personal and business financial strategies to help achieve the most effective outcome.

Is it better to use different firms for tax planning, financial advising and other services?

Although each client is unique, we often see that our clients benefit greatly from having GenCrest take a more comprehensive approach to their financial lives. With a consistent understanding of the specific culture and goals of each affluent client, tax planning can work in concert with wealth management, family office services and business exit planning to ensure a seamless, effective tax strategy that works for the client's objectives.

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Have more questions? Talk with us.

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