

What is in an STA Tax Strategy Report?

STA's Tax Strategy Report provides a step-by-step guide with detailed analysis, graphs, charts and other tools to effectively communicate the specific benefits and strategies for a client's business and personal circumstances. STA's Tax Strategy Report cites specific Internal Revenue Code ("IRC") Provisions, Revenue Rulings, Case Law and other authorities to support all recommendations and tax planning strategies contained in the document. STA has an experienced team of tax industry professionals with an exclusive focus on tax and corporate planning including (but not limited to) the disciplines below:



Entity Structuring/Asset Protection.

STA will provide proper entity structure recommendations that will shield a client's business assets, personal assets and real property from liabilities that may arise from

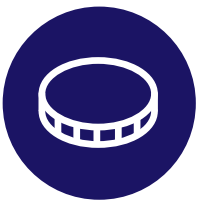
a company's operations. STA considers a client's total liability exposure, business activities and other factors to design the most appropriate corporate structure to shield business and personal assets from judgment and creditor liability.



Succession/Transition Planning.

Whether a client's retirement is immediate, or in the future, STA provides the knowledge, strategies, and most appropriate recommendations for the transition

of closely-held businesses. Beyond a client's immediate tax exposure, STA provides insight and due diligence into many overlooked issues such as the possibility of the client remaining in the company, or that the requisite documents are in place to ensure continuity of the business in the event there is a unplanned catastrophic event.



Tax Savings.

STA will provide tax strategies that will illustrate specific tax credits, deductions and other savings. STA examines business operations, financial statements, and corporate

and personal tax returns to ensure proper reporting and utilization of all applicable tax strategies.



Retirement/Employment Benefits.

If a client's interest is supplementing one's own retirement, or utilizing benefits as an employee retention tool, STA will develop strategies to achieve such goals. STA will provide

recommendations that will ensure that a client will have the assets to fund one's retirement while also ensuring that the turnover in a company is reduced.



Estate Planning.

STA educates clients on the estate planning process, and guides them toward the most appropriate tools to have an effective estate plan that will minimize estate taxes and avoid

the cost and burden of the probate process.

A proper estate plan will ensure that a client's assets will be distributed to designated heirs. Without a plan, a client's estate will be subject to State Law, which may result in undesired transfers and significant legal fees.

