



**CITRIN COOPERMAN®**  
Accountants and Advisors



HIGH NET WORTH INDIVIDUALS

## Focused on Wealth Preservation

Our High Net Worth Individuals Practice advisors provide concierge services, tailored to our clients' needs and priorities. With a depth of resources and a network of solutions, our team is well-equipped to provide sophisticated planning solutions geared towards wealth preservation.

### How Citrin Cooperman Can Help

Citrin Cooperman provides a variety of tax planning and reporting services to wealthy U.S. citizens, foreign nationals, and expats. Our tax planning services are designed to not only minimize your tax liability, but help to build your financial legacy. From trust and estate planning to business and household management, we're well versed in every aspect of tax and financial planning for individuals and their families.

#### Related Practices

- Private Client Services
- Tax Research and Planning
- Trust and Estate Services
- Tax Compliance
- High Net Worth Individuals
- Offshore Voluntary Disclosure Initiative

## Related Services

- Income tax planning
- Estate, trust and gift planning
- International trust and estate tax
- Retirement planning
- Concierge services
- Stock option planning
- Charitable giving