



**CITRIN COOPERMAN®**  
Accountants and Advisors



## PRIVATE CLIENT SERVICES

# Focused on Your Personal Financial Health

Our Private Client Services Practice caters to the needs of individuals and their families, including their businesses, personal holdings, and foundations and trusts. Citrin Cooperman advisors provide personalized, tailored services to meet every individual's goal of growing and preserving personal wealth.

## How Citrin Cooperman Can Help

Financial planning efforts should be an ongoing process rather than a distinctive event. Every individual is unique, and Citrin Cooperman is proud to be able to provide a full range of bespoke services to address any level of need. Whether our clients are based domestically or have investment interest in the U.S., our Private Client Services advisors are poised to assist with any and all tax issues.

We also understand that business is personal. With privacy at the heart of every

### Related Practices

- Commercial Tax Services
- International Tax Services
- IRS Representation and Tax Controversies
- Mergers and Acquisitions Tax
- Not-for-Profit Tax
- State and Local Tax (SALT)
- Trust and Estate

matter, our professionals are dedicated to providing sound financial and business guidance for prominent individuals and their families.

### [Related Services](#)

#### Private Client Services

- High Net Worth Individuals
- Offshore Voluntary Disclosure Initiative
- Tax Compliance
- Trust and Estate Services