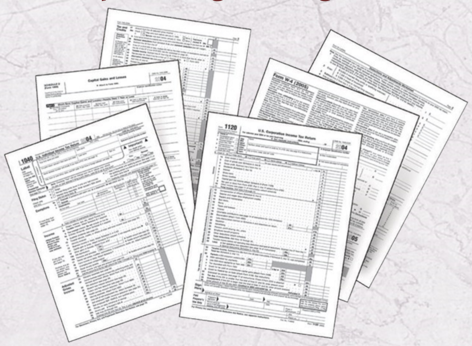
We provide the tools, expertise & personalized service needed to help you implement, your cost effective, tax planning strategies!.

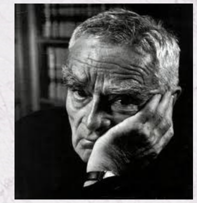


TAX REDUCTION / AVOIDANCE IDEAS

To benefit from tax planning and avoid the common mistakes most taxpayers make, develop individualized strategies for your situation. Tax Planning strategies should incorporate the following planning principles.

1. WHEN is the best time to complete a transaction that impacts your tax situation
2. HOW do you reduce your overall tax burden? What options are available?
3. DEFER any tax obligation, penalty free for as long as possible.
4. MATCH high income with high deductible expenses whenever possible
5. CONSIDER your marginal tax bracket when making decisions. The next dollar bump up, you are to be taxed on from 15% to 39%.

Case of Gregory v. Helvering (2d Cir. 1934)



"Anyone may arrange his affairs so that his taxes shall be as low as possible; he is not bound to choose that pattern which best pays the treasury. There is not even a patriotic duty to increase one's taxes. Over and over again the Courts have said that there is nothing sinister in so arranging ones affairs, as to keep taxes as low as possible. Every-one does it, rich and poor alike and all do right, for nobody owes any public duty to pay more than the law demands."

— Judge Learned Hand, U. S. Court of Appeals (1872-1961)

Forecast

- Individuals
- Partnerships
- Corporations
- S Corporations
- Charitable
- Non-Profits

Forward

A strategic review of your past returns, can likely reduce taxes and increase your families net worth and wealth!

Evaluate

What if Scenarios:

- Small Business
- Estates & Trusts
- Recapitalizations
- Roth Conversions
- Gift Tax Strategies

Now is the time, to talk to us...

Discover the Difference

Call (518) 621-5765

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Welcome to Upstate Tax Group!

Upstate Tax Group was established with the vision to serve our clients' needs with a holistic approach to their current tax preparation needs **as well as their future tax planning needs and goals.**.

Our firm prepares all forms of tax returns: 1040 personal, Corporate S and C, Partnerships, Trust returns and all other federal forms as well as State, Multi-State, City, RITA, even local.

Our firm offers superior client services and consulting to individuals, professionals, and small/mid-size businesses in: the areas of:

- Tax Preparation
- Tax Planning Services
- Roth IRA Conversion Strategies
- SS Taxation Reduction Strategies
- Charitable Tax Planning Strategies
- Small Business Strategy Development

Please contact us for tax preparation and tax planning services.

If you just want tax preparation and nothing more, that's ok... give us a call. We will be careful, accurate, and we will provide a good price for great work!

If you want preparation and then to start learning and planning your own tax outcomes, that's where we shine the brightest!

Call **(518) 621-5765** or e-mail us at info@upstatetaxgroup.com to get started.

Now is the time, to talk to us...

Safety of Your Personal Information is Paramount!

Upstate Tax Group is a member of the United Cloud Partners Services. We are proud to only operate in a private and secure, IRS Circular 230 compliant communications network to submit all state and federal tax work documents. We participate in the tax return preparation process via a proprietary nationwide network through the CPATAXBANK services offered through United Cloud Partners Services, ***so the security of our system is of the highest available anywhere***!

Download Our Intake Form Here
http://upstatetaxgroup.com/about.aspx

A tax planning review appointment can facilitate the process of pulling together your tax information. Our basic "Tax What-If" tool is designed for us to help clients analyze all of their tax planning options The first step is to complete our Client Intake Form and return it to us via USPS for review, together with your last two years, tax returns that includes prior year information and any carry forward data. We will then call you to make an appointment to come in and go over our findings. But, please ***NEVER*** fax or e-mail the completed forms over the phone lines or internet... **It's not safe!** If you prefer, to save on postage, you may send your completed Client Intake Form and prior year returns over the internet through our Proprietary Secure Client Portal IT System.

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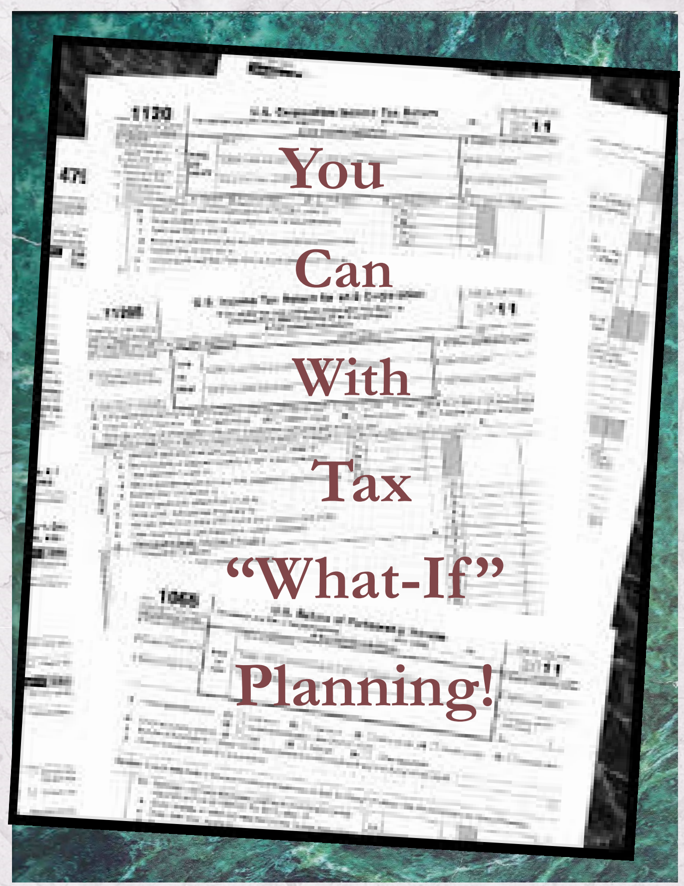
Forecast Forward

What If I Could...

PREDICT & INFLUENCE

...My Tax Outcome?



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