

Personal Tax Planning Overview

The Personal Tax Practice attorneys advise individual and small business clients on individual and corporate tax planning, tax return preparation, audit issues. We also handle Internal Revenue Service inquiries for clients. Additionally, we advise clients about business and personal deductions, the timing of transactions, like-kind exchanges, the proper form of business entity, and the operation and administration of the tax aspects and reporting of business and capital transactions.

Lawyers in our Personal Tax Practice Area have extensive experience in all aspects of business and personal tax including tax and retirement planning, the conduct of tax audits, and appeals of tax assessments on the federal and state levels.

We have handled valuation cases in the U.S. Tax Court, Ohio Supreme Court of Appeals, and countless proceedings before the Internal Revenue Service regional appeals offices, state Boards of Tax Appeals, and the U.S. Court of Claims.



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