



Sarasota Bay Sunrise

CPA Consultants PA

**1605 Main St #1115
Sarasota FL 34234
941.957.1040
Fax 941.957.4600**

**1101 Ninth Ave W
Bradenton FL 34205
941.746.1040
Fax 941.748.1185**

**INFO@CPACONSULTANTS.COM
WWW.CPACONSULTANTS.COM**

**FIRM PHILOSOPHY
CPA CONSULTANTS PA**

“Arranging”

In the words of Judge Learned Hand ~

"Over & over again courts have said there is nothing sinister in so “arranging” one’s affairs to keep taxes as low as possible. Everybody does so, rich or poor, and all do right, for nobody owes more tax than the law demands; taxes are enforced exaction, not voluntary contributions."

Quote from the honorable Judge Learned Hand, Justice, Appellate Court of the United States.

This “arranging” is where tax returns get more complicated. We take the time to arrange your business structures to keep your taxes as low as legally and reasonably possible.

Limited liability companies, real estate, trusts, limited partnerships, C and S corporations, tax-free exchanges, pension and profit sharing plans, estates, international - a knowledge of all these entities and their place in your business plan is required to best structure your overall tax situation.

Simply
Communicating
Complex Tax Issues

CPA Consultants PA
SARASOTA & BRADENTON, FLORIDA, USA
Certified Public Accountants
and Consultants

**Estate
Planning**



Anna Maria City Pier

CPA Consultants PA

ESTATE PLANNING TEAM

As you Certified Public Accountant, we are in the best position to evaluate your current financial situation. We have dealt with your Corporations, LLC's, Partnership's, Trusts as well as your personal taxes every year.

Therefore, we can be the facilitator in an Estate Planning Team that would include your Attorney and CPA and may also include your Insurance Agent, Financial Advisor, and Internal Accountants.

We will analyze your current wills and trusts to determine the income and estate tax effects. Then we will meet with your Estate Planning Team to brainstorm and consider the possibilities based on your goals.

What can we do for you? We can help you gain control of your estate through our estate planning services:

- Estate tax calculation
- Disposition of property
- Liquidity analysis
- International estate tax
- Use of trusts
- Charitable giving
- Multi-state taxation issues
- IRA Elections
- Updates to plan
- Valuations and pensions
- Incentives for heirs

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Biographies of Certified Public Accountants

C. Ray Burnett III CPA



Ray Burnett has thirty years experience as a Certified Public Accountant.

Ray specializes in: Corporate, Individual, Estate, LLC, and Partnership Taxation; Management Advisory Services; Entity Structure; Accounting Systems. Graduate: University of Florida, 1977; Member: American and Florida Institute of CPAs; Life Director Home Builders Association of Manatee County

Lori Gyson CPA



Born in Frankfort, Michigan, Lori began her accounting career in 1984 in Muskegon, Michigan. Lori graduated with a Bachelor of Business Administration degree from Davenport College in Grand Rapids, Michigan in 1995 and became a CPA in 1997. Member; American and Florida Institute of CPAs