

Tax Planning Guide

2009-2010



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At BSPJ our tax services team is at the top when it comes to helping businesses and individuals minimize their taxes and maximize their financial gain over both the short and the long term.

We offer a full range of tax planning and compliance services designed to help you save tax at all levels of government, both here and abroad.

Plan well, save tax

In a year of generally bad economic news, the good news is that smart tax planning can still help you mitigate losses and keep more of your hard-earned income. But to save the most, you'll need to start planning before year end — or sooner.

This Tax Planning Guide highlights recent tax law changes and provides an overview of tax breaks and planning strategies for individuals, families, investors and business owners. You'll find helpful information about ways to save tax on investments and real estate, as well as tax-smart ideas for funding education, saving for retirement and transferring wealth to your heirs.

Thorough tax planning is more important than ever, connect with one of our tax advisors about which strategies are best for you.

Tax Planning Basics

Income and deductible expenses to review before year end.

Investing

Managing capital gains and losses and balancing your portfolio.

Real Estate

Real estate investing tips for a down market.

Business & Executive Comp

A look at business ownership and tax consequences of special rewards.

Family & Education

Tax-smart strategies to benefit your kids and grandkids.

Charitable Giving

Tips for developing a charitable giving strategy.

Retirement

Sound tactics for maxing out your retirement plan.

Estate Planning

A look at estate tax rules, gifting strategies, trusts and insurance.