

Tax and Estate Planning Services



Mauldin & Jenkins...your partner in tax and estate planning.

Individual and Estate Tax Services

The road to reaching your financial goals is not always as straight and smooth as you would like. Mauldin & Jenkins is the partner you need to help you steer clear of any surprises and pitfalls that may happen along your journey. We treat your individual, estate and business planning needs with the utmost care and attention to detail to help you achieve your financial goals.

Tax Services

Mauldin & Jenkins offers a wide array of services tailored to meet your specific planning needs, including:

- Estate and gift planning
- Strategies to reduce transfer taxes
- Financial security for children,
- Tax planning tied to transfer goals
- Tax return preparation & compliance
- Comprehensive tax planning & consulting
- Tax free exchange planning
- Retirement planning
- Business and estate valuations
- Family limited partnerships
- Business succession planning

Tax Solutions

Our expertise in tax and business matters, combined with our consulting specialties, allow us to cater to each client's specific set of circumstances - whether they are entrepreneurs, owners of closely held businesses or high net worth individuals.

We help our clients achieve their business and personal financial goals by taking a proactive planning approach to minimize tax obligations, and by providing the specific and relevant information to make educated planning decisions for the future.

Estate planning – an essential element in the overall tax planning process - is never overlooked. We work with our clients to create a comprehensive estate plan, and our tax planning professionals periodically review and update the plan, as circumstances change over time.

Qualified Tax Advisors

Tax laws often change dramatically each year. Our continuing education program, coupled with more than 90 years of practical business experience, helps keep the professionals at Mauldin & Jenkins knowledgeable of the latest regulatory updates.

It's important to have a partner working on your behalf to secure your future. Our tax planning professionals take an integrated and consultative approach to devising custom, high-quality tax strategies. We listen and respond.