



## OUR APPROACH

We work closely with you to proactively identify opportunities, mitigate risks, and craft a long-term strategy aligned with your personal, business, and financial goals. Our team of attorneys, CPAs and enrolled agents go beyond the mere preparation of tax returns by integrating tax planning strategies tailored to the unique needs of our clients. This includes, but is not limited to, planning for a closely held business, liquidating investments, managing multi-state filings, minimizing capital gains, structuring charitable giving, and - most importantly - strategically reducing your overall tax burden.

## TAKE THE NEXT STEPS

- Proactively plan individual & business tax strategies
- Optimize state and local tax deductions
- Minimize capital gains taxes
- Maximize charitable giving
- Navigate complex estate, trust and gift tax rules
- Effectively manage complex income streams
- Compliance with multi-state and international tax
- Reduce exposure to IRS and State Tax authorities

## CONTACT US

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## STRATEGIC TAX PLANNING FOR INDIVIDUALS & BUSINESSES

**PERSONALIZED TAX  
SOLUTION TO PRESERVE  
AND GROW YOUR  
WEALTH**

### Three Locations to Best Serve You

#### College Park

7305 Baltimore Ave.  
Suite 102  
College Park, MD 20740-3232  
**Phone:** (240) 667-7234

#### Frederick (by Appt. only)

7100 Guilford Dr,  
Suite 200  
Frederick, MD 21740  
**Phone:** (301) 473-4445

#### Jefferson

4014-B Mountville Rd.  
Jefferson, MD 21755  
**Phone:** (301) 473-4445

## ABOUT OUR FIRM

Stephen is an experienced Attorney and Certified Public Accountant with over 20 years of advising, both individual and business clients, on strategic tax planning. He holds an advanced law degree (LL.M) in Taxation and is a member of the Maryland Bar, the U.S. Tax Court Bar, and the U.S. District Court for the District of Maryland. Stephen specializes in identifying both short and long-term tax opportunities to help clients optimize their financial position with confidence and clarity.



**SCHEDULE YOUR FREE  
CONSULTATION TODAY!**



## TAX PLANNING STRATEGIES

### Our Expertise Includes:

- Advanced individual tax planning and preparation
- Advanced business tax planning and preparation
- Non-Profit and Private Foundations
- State and Local Tax (SALT) Planning
- Charitable giving strategies
- Estate, Trust & Gift tax services
- Family Office Structure & Support
- Investment tax planning
- Multi-State and International tax compliance
- Federal and State controversy civil and criminal
- International Tax Planning

## WHY CHOOSE US?

Cromwell & Associates, CPA puts our experience and expert team of attorneys, CPAs & Enrolled Agents to work to solve your tax problems quickly and affordably. We offer free consultations of your case and explain your options. We generally work on a flat (fixed) fee basis so you know upfront what it will take to resolve your tax problems.

