THE CENTER FOR WEALTH PLANNING

Tax Planning Services

Understanding tax considerations is a critical part of private wealth management. Complex tax rules affect virtually every aspect of personal finances, including retirement and estate planning, insurance, compensation and benefits, philanthropy and investments. The tax professionals at the Center for Wealth Planning, part of Credit Suisse's Private Banking USA business, can consult with you and your tax advisors on the interplay of income tax with other aspects of your wealth and personal planning.

Individual and entity compliance experience

Our professionals have experience preparing federal and state income tax returns for wealthy individuals, family groups and their related entities. We understand how taxes affect financial planning and can bring this experience to you and your advisors as you evaluate different retirement, investment, philanthropic and related wealth management strategies.

Stock option planning

We can assist you in developing an exercise and sale strategy for your stock options that optimizes tax and cash flow-efficiency. We do so by modeling the after-tax effects of various alternatives, including ways to reduce the Alternative Minimum Tax upon the simultaneous exercise of incentive stock options (ISOs) and non-incentive stock options (NSOs).

Executive compensation planning

We can consult with you and your tax advisors on strategies to maximize the after-tax receipt of wealth held through executive compensation plans, including employer stock, ESOPs and deferred compensation plans.

Please Note: *The Center for Wealth Planning provides consulting services to wealthy individuals and families. We do not draft documents or provide tax or legal advice.*

This material provides information on the services that Private Banking USA's Center for Wealth Planning may provide in connection with creating a Financial Plan for you. Please note that in these cases services shall terminate at the time your Financial Plan is delivered to you. If you are interested in receiving ongoing advice or assistance in the implementation of your Financial Plan, you will need to execute a new agreement with us for these additional services.

This material should not be relied upon as the sole or primary basis for any investment or other financial decisions or used in substitution for the exercise of independent judgment, and does not purport to contain all of the information you may wish to consider in making decisions regarding your investments or finances. Credit Suisse Securities (USA) LLC ("CSSU") does not provide legal or tax advice. Prior to making any investment or other financial decision, you should consult your accounting, tax, and legal advisors to understand its implications.

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