

TAX COMPLIANCE SERVICES

UNREALISTIC VALUATIONS CAN BEAR A SUBSTANTIAL RISK OF BEING CHALLENGED BY THE IRS.

Such challenges often translate into significant consequences and heavy financial penalties. Quist helps to ensure that our client's interests are protected from unnecessary risks by providing a thorough analysis in reports designed to meet the requirements of the Uniform Standards of Professional Appraisal Practice and IRS guidelines for valuations of private companies, including the adequate disclosure regulation pertaining to gifts.

EXPERIENCE

We enjoy an excellent reputation with the IRS. Our reports are designed to comply with the USPAP and the IRS' adequate disclosure regulation to ensure that our client's interests are protected. We have completed more than 400 discount studies in the last five years alone.

RESOURCES

As a leading national independent business valuations firm, we bring extensive resources to every client relationship. The Quist staff of dedicated valuation professionals consists of CFA charter holders, Accredited Senior Appraisers (ASA) and Economists. We maintain a growing database of Federal Tax Court cases and monitor discount market studies to ensure that we are up-to-date on all current issues impacting tax driven valuation.

AREAS OF EXPERTISE

- Gift and Estate Tax
- Family Limited Partnerships
- Limited Liability Companies
- Stock Options
- Employee Stock Ownership Plans (ESOP)
- Intangible Assets
- Undivided Interest in Real Estate
- S Corporation Elections
- Charitable Gifts

WHY WORK WITH QUIST?

Quite simply, Quist provides a combination of experience, perspective, quality and expertise that is not available through any other firm.

EXPERIENCE

For over twenty years, Quist has assisted its clients to ensure that they receive accurate analysis to protect their assets and mitigate their risk of being challenged by the IRS.

PERSPECTIVE

Unique among valuation firms, Quist conducts its analysis from the perspective of both the "hypothetical willing buyer" and the "hypothetical willing seller."

QUALITY

Quist reports have consistently withstood the intense scrutiny of the IRS, SEC and the U.S. Department of Labor.

EXPERTISE

Each project is led by a Quist managing director, who holds the Chartered Financial Analyst designation, a capability that is unmatched by our competitors.