

Tax Due Diligence



We help you understand where potential tax risks and liabilities could emerge.

Heading into an M&A transaction? Now's the time to get a Tax Due Diligence Diagnostic.

Whether the next step for your business is funding, an IPO, SPAC, or merger, Holtzman's team of tax due diligence professionals are ready to help. Overstated net operating losses (NOL), underreported tax liabilities, non-filing exposures, failure to charge sales tax or pay use tax, and payroll tax errors can all result in potentially significant tax exposures. We will work with you to identify risks and mitigate potential issues before they arise to ensure you are in an optimum position through your upcoming financial statement audit or due diligence effort.

From strategy to execution, we identify the tax subject areas that are unique to your company and determine how to efficiently address your needs. Below are some key services we offer that will ensure you achieve tax readiness for a smooth transaction.

Tax Due Diligence Services:

- Tax attribute valuation assessment (Sec. 382/383)
- State and local income tax, sales and use tax, and business activity tax considerations
- Transaction structuring considerations
- Review of any prior acquisitions
- Review of International tax issues
- Compensation & benefits considerations
- Assessment of post-closing purchase price allocation
- Additional tax planning strategies



Why Choose Holtzman?

The Holtzman service model is centered around getting to know you, your business, and what you want to achieve. Whether you're a startup or a market leader, our team is prepared to help guide you throughout your business journey. With diverse expertise, our trusted accountants and strategic advisors will collaborate with you to help you achieve your business goals.



High-touch
Approach



Trusted
Relationships



Unrivaled
Efficiency



Comprehensive
Guidance

Industries We Serve

Expertise in your industry. Collaborative approach. A trusted name.

At Holtzman, we work with hundreds of clients from a wide variety of industries and in different stages of growth. We have extensive knowledge and experience with technology, healthcare, startup, nonprofit clients, and more. We believe that understanding your particular industry is essential to becoming an extension of your team to provide high-value service. Our deep, cross-industry expertise and proven solutions help to keep you ahead of your competition.

- ▶ Construction
- ▶ Healthcare
- ▶ Manufacturing
- ▶ Natural Resources
- ▶ Nonprofit
- ▶ Professional Services
- ▶ Technology
- ▶ Retail/CPG

About Us

Holtzman Partners is a leading certified public accounting firm that helps growing companies realize their full value through a full suite of services, including Tax, Audit & Assurance, SOC Compliance, SOX Readiness & Compliance, Advisory, and more. **Our accountants have extensive experience with tax-related issues for corporations and pass through entities**, and leverage their experience from Big Four accounting firms and private companies to better understand your needs.