



## Tax Services for Individuals

You've reached a point in your life where you put value on the counsel you receive from your trusted advisor. For nearly fifty years, discerning individuals have turned to Naden/Lean, LLC for guidance on financial matters that impact their lives. Clients know that our flat-fee billing allows them to contact us when questions arise without having to worry that an invoice is generated with each call.

Throughout the year, we help you plot a course towards wealth preservation and accumulation. The diverse backgrounds of Naden/Lean's tax and business experts allow you to draw upon a multitude of strengths and disciplines to meet your specific needs.

- Tax planning and preparation
- Wealth accumulation strategies
- Estate planning
- Financial and investment strategies
- Risk protection strategies
- Succession and business continuity planning
- Educational funding strategies

- Charitable Remainder Trusts
- Situational planning

### **Resources**

Naden/Lean offers its clients many opportunities to learn more about a variety of issues that impact their financial lives. We invite our clients to join us for private seminars on topics such as:

- Transition planning
- Tax law changes
- Starting a business
- Business succession planning
- Estate planning

These seminars are often on behalf of or in conjunction with many of our strategic partners and associations. Naden/Lean maintains a comprehensive Web site that outlines the dates, times and topics of these seminars as well as helpful financial tools and tax law updates. For more detailed information, please visit: [www.nlgroup.com](http://www.nlgroup.com).

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# Naden/Lean, LLC

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## Tax Services for Individuals, continued

### **Trust Us**

During our last two peer-reviews (one of the membership requirements of the American Institute of Certified Public Accountants), Naden/Lean received the highest rating possible which is a clean opinion with no letter of comments. What this means for you is that you can be assured that any attest work (audits, reviews, compilations, etc...) we perform goes through a rigorous internal quality review before it reaches you.

### **Contact Us**

For more information regarding our services, please contact Mary-Kay Leary, CPA at (410) 453-5500 xt. 1466 or [mleary@nlgroupp.com](mailto:mleary@nlgroupp.com).