

Tax Services

Fortner, Bayens, Levkulich & Garrison, P.C.'s Tax Services will help put you in a position to maximize your tax benefit. We will conduct a prompt assessment of your bank's current tax position. We have extensive experience and keep current on Internal Revenue Service and bank regulatory concerns about bank tax issues so you can avoid problems before they arise. Our experienced staff can identify problem issues regarding intercompany tax payments for bank holding companies.

*Unmatched
expertise at a
competitive price.*

Tax Compliance

Our staff has been thoroughly trained in taxation of banks. With our experience with numerous banks and our participation in nationally recognized tax seminars, we remain current with developments affecting banking. We help banks interpret regulatory requirements relating to the recording of deferred tax assets. We provide specialized tax services regarding mergers and acquisitions, in addition to trust tax returns, employee benefit returns, exempt organization and select individual returns.

Tax Planning

We will be actively involved in the planning process to ensure maximum tax savings while avoiding the possible pitfalls related to the allowance for loan losses, alternative minimum taxes and net operating losses. We closely examine your status to not only review the reasonableness of the income tax account balances, but also to determine whether there are any tax planning strategies available that may be implemented before year end. Since we will be intimately familiar with your tax situation, we are able to provide advice on current developments affecting your institution.

**FORTNER, BAYENS, LEVKULICH
■
& GARRISON, P.C.**

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