



Mindfully Aligned  
With Your Goals



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## Accounting, Tax and Advisory Services for the LGBT Community

Same-sex married couples are now able to take advantage of many of the benefits previously available only to heterosexual married couples. In light of this significant update and the complexities and shifting tax landscape for the Lesbian, Gay, Bisexual and Transgender (LGBT) community, it is essential to work with professionals who are experienced and up-to-date on the latest laws and regulations. Same-sex couples should review their financial and tax planning with professionals who are sensitive to the issues facing the LGBT community and who keep abreast of state-specific details as they develop.

The Geltrude LGBT Community Practice Group is dedicated to serving the needs of the LGBT community. Our professionals understand your financial and tax needs, help structure your financial life, and ensure you are taking advantage of constantly changing laws. Equipped to handle all situations, the experienced accounting and financial team at Geltrude will provide you with the most beneficial solutions.



## The Geltrude LGBT Community Practice Group

At Geltrude & Company, we provide services to LGBT couples and individuals in the following circumstances:

- Single
- Married
- Registered Domestic Partners
- Cohabitation
- Divorced

Knowing the laws in your state, as well as, your current and future goals and plans, are essential in developing and implementing effective tax planning strategies that are customized for you and your family. There are many important questions that need to be addressed, including:

- Do you have deduction questions because of medical, adoption, or legal expenses?
- Do you have issues concerning retirement pay or capital loss allocation?
- Have you jointly purchased a home or property?
- Have you properly planned for estate taxes and issues?

The Geltrude LGBT Community Practice Group has a dedicated team of professionals who are focused on the financial and tax planning strategies and issues facing the LGBT community and addressing your needs in a rapidly changing environment. We have the experience, skills, and sensitivity to help you structure your financial life and create the most beneficial scenario possible.

Serving as your trusted advisors, our skilled accounting and financial professionals provide a wide range of tax services for individuals and families, including:

- Individual and Family Tax Services
- Amended Return Review in Light of DOMA
- Estates, Trusts and Private Foundations
- Education and Retirement Planning
- Adoption and Child Tax Credits
- Pre-Nuptial Agreement Consulting
- Divorce Services
- Personal Business Management and Family Office Services
- Insurance Planning
- Health and Welfare Benefits Review

### ABOUT GELTRUDE

Established in 1995, Geltrude & Company provides accounting, auditing and tax services as well as litigation support, business valuations, succession planning, loan restructuring, estate planning, and comprehensive financial and profitability consulting. Our clients represent a wide variety of business and individual interests and include real estate owners and developers, manufacturers, wholesalers, retailers, import/exporters, professional practices, and non-profit organizations.

### OUR SERVICES

**Accounting**

**Auditing & Risk Management**

**Tax Services**

**Employee Benefit Plan Audits**

**Business Valuations**

**Litigation Support**

**Mergers & Acquisitions**

To learn more about Geltrude's professionals and services, please visit our website at

[www.geltrude.com](http://www.geltrude.com)