



Trusted advisor for 70+ Years

Tax Advisory & Compliance

Business Consulting

Audit & Accounting



Shea Labagh Dobberstein offers an umbrella of high net worth services to fit your needs, allowing you to plan ahead and make the most of your time and money.

The firm is a confidential advisor to many high net worth clients who have come to SLD with certain financial planning, asset management and legacy concerns. Activities like estate planning, new ventures and charitable gift giving require strategy and planning. Often, we are the first to call when clients have an important financial decision to make because we mitigate risk and can simplify the matters at hand.

Some of the firm's high net worth clients started with the firm as business owners, and over time come to reach out to SLD for personal services as their businesses grew. Our team of professionals meet with our clients regularly throughout the year to help them understand their financial outlook, and offer custom solutions to realize their objectives. This is why over the decades generations of clients have remained with the firm and continue to depend on SLD as a valued advisor.

HIGH NET WORTH SERVICES

Shea Labagh Dobberstein will work closely with you to protect your assets and manage, preserve and transition wealth. The firm has experience working with some of the Bay Area's most prominent individuals. These clients appreciate how we simplify their lives, and save them time and money.

- » Income Tax Planning and Compliance
- » Preparation of Federal, State and Local Tax Returns for Individuals, Corporate, Estates and Trusts
- » Strategic Tax Planning to Minimize Tax Liabilities and Alternative Minimum Tax (AMT) Consulting
- » Stock Options, Compensation and Fringe Benefits
- » Estate and Trust Income Taxation and Consulting
- » Risk Management Consulting
- » Family Businesses - Controllership, Succession Planning, Financial Statement Preparation
- » Accounting and Bookkeeping Services
- » Charitable-Giving Strategies
- » IRS Audit Representation

Since 1944, Shea Labagh Dobberstein has developed relationships in the professional services community, and can leverage a network of bankers, lawyers, insurance brokers and money managers to bring the right professional services to you.

About Shea Labagh Dobberstein (SLD)

For over 70 years, SLD has uniquely positioned itself to help privately-held business clients grow by offering the resources of a national firm along with the personalized attention that only a regional firm can provide. Through our specialized expertise and dedicated service teams, clients have access to a spectrum of accounting, tax, audit and advisory services. Our broad portfolio of clients means clients can tap into a vast wealth of experience and industry knowledge. A member of the DFK alliance, SLD gives you access to resources around the globe.

Learn more at sldcpa.com.



SHEA LABAGH DOBBERSTEIN
CERTIFIED PUBLIC ACCOUNTANTS & ADVISORS

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