PRIVATE CLIENT SERVICES

WHITE GLOVE SERVICE

Offering a high touch approach, we have extensive experience serving high net-worth individuals, their families, c-suite executives, law firm partners, and others with complicated tax and financial structures. We help our clients reach their unique goals, creating a strategic, tailored, plan.

Starting with a lot of listening, we help our clients reach their unique goals, creating a strategic plan tailored to each person or family's specific needs and objectives. Our professionals are objective and flexible to ensure that the needs of our clients are met, while working alongside our clients' other trusted advisors. We offer the following advisory and compliance services, and more:

- Income Tax Planning & Consulting
- Estate, Gift & Trust Consulting & Compliance
- Family Office Services
- Estate & Wealth Succession Planning
- Charitable Giving & Philanthropic Foundations
- And More

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crr CPA

CRR is a full service accounting and consulting firm serving Boston and New England since 1994. We provide accounting, auditing, tax, and business consulting services to organizations in a diverse range of industries. We also provide tax and financial consulting services to individuals, estates, and trusts.

HEAR FROM OUR CLIENTS:

"Excellent local CPA firm"

"Accountants you can actually understand"

"Big enough to have the resources you need, small enough to be personal"

"Intelligent, efficient, customer-first organization"

"Professional organization with great people and a solid reputation"

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