



EVOLVED

TAX AND ADVISORY

Our Services

evolvedtax.com

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1540 Broadway, Suite 3930 New York, NY 10036



**Does your CPA work for the IRS?
Or do they work for you?**



EVOLVED
TAX AND ADVISORY™

OUR SERVICES





GET READY TO EVOLVE.

Our CPAs and tax professionals deliver a full range of tax compliance and business advisory services geared toward every stage of your growth. Whatever journey you're on, you'll benefit from our ambitious and collaborative work ethic and the practical solutions we bring to the table.



WHO WE SERVE

PRIVATE EQUITY FUNDS | VENTURE CAPITAL | EMERGING MARKETS | REAL ESTATE

Federal and State Tax Compliance Services

- State and Local Tax (SALT)
- Fund structures tax analysis
- Tax & waterfall allocations
- Mergers & acquisitions
- Tax due diligence
- Pre-sale & post-sale tax readiness
- Review of private placement memorandum

International Tax

- Onshore / offshore fund structuring
- Compliance for foreign funds and investors
- Tax modeling
- Stock basis and E&P studies
- FBAR / FATCA / CRS / AEOI
- Tax notices and tax authority audits
- Tax conflict services

PORTFOLIO COMPANIES

Federal and International Tax

- Accounting method changes
- Pre-sale tax readiness and transaction cost studies
- ASC 740 tax provisions
- Tax modeling
- M&A transactions
- Stock basis + earnings and profits studies

State and Local Tax

- Pass-Through Entity Tax (PTET)
- Multi-state tax analysis & compliance
- Nexus & apportionment studies
- Sales, use and property tax compliance
- Voluntary Disclosure Agreements (VDA)
- Tax authority representation

HIGH NET WORTH INDIVIDUALS | FAMILY OFFICE SERVICES

Individual Income Tax Compliance

- Multi-state tax analysis & compliance
- Investment & capital gains planning
- Residency & domicile analysis
- Private equity fund interests
- Tax due diligence
- IRS & state audit defense
- FBAR / FATCA / CRS / AEOI
- Expatriation & relocation planning

Estate, Gift & Trust Planning & Compliance

- Lifetime gifting strategies
- Family business succession planning
- Family limited partnership structuring
- Trust structuring & administration
- Charitable gift & foundation setup

CORPORATE TAX | INCOME TAX PROVISION

U.S. Corporate Income Tax Filings

- Multi-state tax analysis & compliance
- Preparation of income tax provisions
- Estimated tax quarterly calculations
- Nexus & apportionment studies
- U.S. international tax filing compliance
- Sales, use and property tax compliance
- Tax audit defense and controversy support

M&A Transactional Tax Services

- Buy-side and sell-side tax due diligence
- Transaction structuring cost analysis
- Section 382 studies for NOL limitations
- Entity structuring and restructuring analysis
- Earnings & profits tax basis studies
- Review and application of U.S. tax treaties
- Withholding tax planning

WE TRANSFORM TAX COMPLIANCE CHALLENGES INTO OPPORTUNITIES FOR GROWTH.

At Evolved, we focus on treating every client as a valued partner, not just a number. Work with a dedicated tax team that knows your business.

Offices

New York City

Headquarters
1540 Broadway, Suite 3930
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Stamford

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PRIVATE EQUITY FUNDS AND MERGERS & ACQUISITIONS

COMPREHENSIVE TAX SERVICES FOR PRIVATE EQUITY, PORTFOLIO COMPANIES AND REAL ESTATE INVESTMENT FUNDS

Evolved provides specialized advisory services to private equity firms and their portfolio companies, driving value creation across the investment life cycle. From pre-acquisition due diligence and add-on integration to exit readiness and divestiture planning, our team delivers comprehensive, solutions-oriented support grounded in deep transactional and operational expertise.

Private Equity Tax Services

Evolved's Private Equity team works with funds of all sizes and at every stage of their life cycle. Our professionals understand the unique needs of private equity, portfolio, venture capital, and mezzanine funds in addition to the tax requirements of buyout firms.

Federal and State Tax Return Preparation

- U.S. partnership tax returns
- State composite, Pass-Through Entity Tax (PTET) and withholding filings
- Nonresident partnership returns and compliance coordination

Section 704(b) and Capital Account Maintenance

- Book-tax capital account tracking
- Tax basis and GAAP capital maintenance
- Target capital and waterfall allocation

Schedule K-1 & K-3 Preparation and Reporting

- Timely and accurate K-1 & K-3 generation for LPs and GPs
- State apportionment reporting and disclosures
- Footnote customization for foreign, tax exempt, and blocker entities

Foreign Reporting and Withholding Compliance

- U.S. International Tax Filings Forms 8865, 5471, 8858, 8621 (PFIC), and 8938
- FBAR, FATCA and CRS classification and reporting
- Forms 1042/1042-S for foreign investor withholding
- FDAP, ECI, FIRPTA and U.S. Real Property Interest (USRPI) compliance

PRIVATE EQUITY PORTFOLIO COMPANIES TAX SERVICES

Funds and portfolio companies turn to us for tax structuring, due diligence, transaction planning, compliance, and sell-side readiness.

Portfolio Company Services

- Federal and multi-state corporate and pass-through entity income tax returns
- ASC 740 (income tax provision) preparation and FIN 48 documentation
- Sales and use tax return preparation and nexus compliance
- Payroll tax compliance and employment tax filings
- 1099 and 1042/1042-S filing and reporting support
- Business tax license and state tax registration compliance
- Compliance with Foreign Account Tax Compliance Act (FATCA), Common Reporting Standard (CRS) and Automatic Exchange of Information (AEOI), including withholding statements and validations of U.S. tax certifications
- Respond to federal and state tax notices and assist by working with the relevant tax authorities on behalf of our clients to resolve any issue in a timely and efficient manner

MERGERS & ACQUISITIONS TAX SERVICES

Evolved provides private equity M&A tax services that streamline diligence, structuring, and post-close planning to mitigate risk and maximize efficiency.

Buy-Side Support

- Tax due diligence (federal, state, local, and international)
- Deal structuring analysis (asset vs. equity purchase)
- Entity selection and jurisdictional structuring
- Tax modeling and cash tax impact analysis
- Review of acquisition agreements for tax provisions

Post-Transaction Planning

- Legal entity rationalization and restructuring
- Integration of tax functions and processes
- Basis step-up planning and allocation of purchase price
- Implementation of tax elections and compliance
- Accounting method changes and elections

Sell-Side Support

- Sell-side tax due diligence preparation
- Exit and transaction readiness planning
- Stock vs. asset sale analysis
- Carried interest and GP incentive planning
- Section 1202 and 1244 qualification analysis

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VENTURE CAPITAL + START UPS

FULL-SERVICE TAX COMPLIANCE AND BUSINESS ADVISORY

As the investment strategies and business structures of venture capital funds become increasingly complex, an advisor with a holistic approach is critically important. Evolved's professionals offer comprehensive, integrated solutions, delivering insight into the interaction of the many components of our clients' businesses. Through our services, we strive to facilitate our clients to effectively navigate complex tax challenges and capitalize on business opportunities by enhancing tax efficiency in their operations and infrastructure.

VENTURE CAPITAL FUND SERVICES

- Develop tax efficient strategies for venture capital firms and their investors and ensure compliance with applicable tax laws and regulations.
- Review Private Placement Memorandum (PPM/OM/LPA) with a particular focus on the tax section for compliance and tax minimization.
- Prepare schedule K-1s and K-3s to provide comprehensive and accurate reporting to fund investors.
- Preparation of partnership income tax returns for the fund, general partner and investment manager.
- Tax compliance of foreign investments such as PFICs, CFCs and foreign partnerships.
- U.S. tax reporting and compliance for foreign investors including withholding pertaining to FDAP and ECI.
- Prepare and file required state income tax withholding forms and reports, ensuring compliance with all applicable state laws and regulations.
- Comply with Foreign Account Tax Compliance Act (FATCA), Common Reporting Standard (CRS) and Automatic Exchange of Information (AEOI).
- Respond to federal and state tax notices and aid by working with the relevant tax authorities on behalf of our clients to resolve any issues in a timely and efficient manner.

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Full service Tax Compliance and Business Advisory Services for Start Ups

Business Entity Formation

Start ups need to select an appropriate business entity to operate under, such as a sole proprietorship, partnership, limited liability company (LLC), or corporation. Each type of entity has different tax implications, so it is essential to choose the one that best suits the needs of the business.

Tax Compliance

All businesses are required to comply with federal, state, and local tax laws. Tax compliance includes filing tax returns and paying taxes on time, as well as maintaining proper documentation to support tax deductions and credits.

Sales Tax

States have been enforcing their sales and use tax regimes like never before. It is important to understand the sales tax laws in the jurisdictions where the business operates.

Payroll Taxes

As a business owner with a dedicated workforce, it's crucial to take charge of payroll tax obligations. Empower your financial strategy by efficiently withholding and remitting payroll taxes, encompassing federal and state income taxes, social security and medicare taxes, and unemployment taxes.

Tax Planning

Effective tax planning is important for any business, but especially for start ups, as they may have limited resources to work with. Tax planning involves reviewing the company's financial situation to identify tax saving opportunities and minimizing tax liabilities.

Tax Audits

In the event of a tax audit, equip yourself with the power of impeccable documentation. Seamlessly substantiate the tax deductions and credits claimed on your tax returns with precision. With proper documentation, you'll confidently navigate the audit process, ensuring compliance and safeguarding your hard earned profits. Don't leave anything to chance, empower your business with airtight documentation and pave the way for tax success!

Foreign

Foreign businesses operating in the United States require a range of tax services to meet their obligations and optimize tax planning strategies. It is advisable to consult with a tax professional or accountant with experience in international tax to ensure compliance with U.S. tax laws and maximize tax savings.

In addition to our tax planning and compliance services listed above, our tax technology and automation solutions enable us to streamline tax compliance and reporting processes for our venture capital and start up clients. At Evolved, we are committed to delivering exceptional service and expert guidance to our clients, leveraging our expertise and technological resources to help them achieve their business goals while minimizing risk and enhancing tax efficiency. Our personalized approach ensures that each client receives the support they need to navigate the ever-evolving complex regulatory environment.



EVOLVED
TAX AND ADVISORY

HIGH NET WORTH TAX SERVICES + FAMILY OFFICES

SOPHISTICATED HIGH NET WORTH INDIVIDUALS TAX SERVICES

Evolved is devoted to advising high net worth individuals and entrepreneurs to realize their personal and familial financial goals. Our method is multidisciplinary, combining skills and expertise in taxation, wealth management, and estate planning. Our comprehensive tax strategies are tailored around your unique goals for business, investing, philanthropy, and generational planning.

Minimize Tax Liability

Comprehensive advisory and compliance strategies that consider our clients' complex business and personal objectives.

Proactive Strategies

Forward-thinking tax advice on a wide range of taxable events, including asset dispositions, equity award issuances, upcoming legislative changes, and more.

Preserving Legacy

Wealth preservation for family members and descendants with thorough estate tax planning strategies.

Tax – Developing Innovative Strategies To Help Minimize Tax Liability

- Federal, state, and local tax planning and compliance
- Tax advisory and controversy assistance
- Tax structuring and due diligence
- Credits & incentives
- Residency advisement

Transactions – Making The Most Of Every Deal

- Financial due diligence
- Risk assessment
- Organizational & tax structuring
- Mergers & acquisition
- Onshore/offshore fund structuring
- Post-transaction tax services

Wealth Planning – Creating A Comprehensive Wealth Plan To Focus On Your Future Legacy

- Individual/family wealth transfer planning
- Business succession planning
- Review estate planning documents
- Gift tax/estate tax/generation skipping transfer tax
- Trust structuring

Philanthropy – Maximizing The Impact Of Your Charitable Giving

- Charitable planning to reflect the client's values, interests, and goals
- Aligning charitable giving with estate planning strategies
- Trust & foundation structures

Governance – Providing Structure For Family Office Operations So You Can Focus On The Future

- Succession and contingency planning
- Comprehensive coordination of all outside advisors for technical decision making

Back Office – Providing Support To Make The Day-To-Day More Efficient

- Well versed in tax law changes
- Coordination of services needed for tax compliance/estate planning

ENHANCE AND EXPAND YOUR FAMILY OFFICE

Tax Compliance & Reporting

- Individual, trust, and estate income tax return preparation
- Partnership and investment entity compliance (Forms 1065, 1120-S)
- Gift tax reporting and annual exclusion tracking (Form 709)
- Private foundation, charitable trust, and non-profit filings (Forms 990-PF, 990-T)
- State residency, domicile, and multi-state filing coordination
- Estimated tax management and payment tracking
- Residency audit defense and controversy support

International & Cross-Border Tax

- Residency, expatriation, and dual status planning
- Foreign trust, corporation, and partnership compliance
- PFIC, CFC, and GILTI mitigation and reporting
- Treaty analysis and withholding tax coordination
- AEOI (FATCA/CRS) certification and reporting
- Puerto Rico Act 60

Generational & Estate Planning

- Estate tax projections and liquidity analysis
- Lifetime gifting and transfer strategies (GRATs, IDGTs, CLATs, etc.)
- Step-up in basis and succession planning evaluations
- Coordination with estate attorneys and fiduciaries
- Post-mortem administration and family transition support
- Private foundation management and charitable impact reporting
- Consolidated family office reporting and inter-entity coordination

Investment & Transaction Advisory

- Transaction level tax diligence and modeling
- QSBS (Section 1202) qualification and tracking
- Opportunity zone investment analysis and compliance
- Private equity, venture, and alternative asset tax optimization
- Passive activity, 199A, and NII planning for investment portfolios

Evolved delivers sophisticated, white glove tax advisory and compliance solutions designed for today's multi-generational families and family offices. We integrate deep technical expertise with a proactive, relationship driven approach, ensuring every entity, trust, and investment structure is optimized for efficiency, transparency, and long-term preservation of wealth. From annual filings to complex global structures, our team operates as your family's outsourced tax department, providing precision, responsiveness, and peace of mind.

Our holistic model goes beyond compliance. We partner with families, attorneys, and investment advisors to build tax-efficient structures that align with your vision, whether that means generational wealth transfer, philanthropic planning, or cross-border coordination. With Evolved, your family gains a trusted advisor who anticipates challenges, streamlines reporting, and safeguards your legacy through every stage of growth.

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STATE AND LOCAL TAX (SALT)

NAVIGATING COMPLEXITY ACROSS EVERY JURISDICTION

Evolved provides state and local tax (SALT) services that simplify multi-jurisdictional compliance and identify strategic savings opportunities for your business. We help businesses and investors navigate the ever changing state and local tax landscape with precision and strategy. Our SALT team combines deep technical expertise with proactive planning to minimize risk, maximize opportunity, and ensure full compliance across all jurisdictions where you operate or invest. Whether managing multi-state filings, nexus exposure, or complex apportionment, Evolved delivers clarity in an increasingly fragmented tax environment.

Compliance & Reporting

- Multi-state corporate, partnership, and individual income tax return preparation
- Apportionment analysis and state-by-state allocation reviews
- Franchise and gross receipts tax compliance
- Sales and use tax registration, reporting, and voluntary disclosure filings
- Payroll, withholding, and employment tax compliance reviews
- Local business license and gross receipts tax coordination
- Multi-state income sourcing for funds, investors, and management companies

Controversy & Audit Support

- Representation in state and local tax audits and appeals
- Voluntary disclosure and amnesty program management
- Notice resolution and correspondence with taxing authorities
- Support for nexus disputes, apportionment challenges, and residency audits
- Penalty abatement and negotiated settlement assistance

Planning & Strategy

- Nexus studies and exposure assessments (economic and physical presence)
- State tax credit and incentive optimization (R&D, investment, job creation)
- Pass-Through Entity Tax (PTET) election analysis and implementation
- Income sourcing and apportionment planning for multi-entity structures
- Residency and domicile tax planning for owners and executives
- Transactional tax structuring for M&A and reorganization events

Advisory & Transaction Support

- State tax due diligence for acquisitions and divestitures
- Post transaction integration and entity rationalization planning
- Analysis of deferred tax impacts and ASC 740-10-25 state implications
- Coordination with corporate and partnership level federal tax planning
- Market based sourcing versus cost of performance evaluations
- Property tax and unclaimed property reviews

Evolved's State & Local tax team provides more than compliance, we deliver strategy. We partner with CFOs, controllers, and fund managers to assess exposure, implement PTET elections, and structure operations to minimize state and local liabilities. Every business is impacted differently by state and local tax rules.

Evolved tailors its approach to your footprint, entity structure, and growth plan, combining proactive planning with audit ready compliance. Whether expanding into new states, acquiring a target with multijurisdictional exposure, or addressing complex residency challenges, we operate as your dedicated SALT department delivering clarity, consistency, and control.

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CORPORATE TAX + INCOME TAX PROVISION

COMPREHENSIVE TAX RETURN PREPARATION, PROVISION CALCULATIONS, AND STRATEGIC PLANNING ENSURING COMPLIANCE, MITIGATING RISK, AND OPTIMIZING TAX OUTCOME.

Evolved provides end to end corporate tax compliance and consulting services, combining technical expertise with practical guidance to support accurate filings, strategic planning, and risk management across all aspects of corporate taxation.

Evolved delivers full spectrum corporate tax and ASC 740 provision solutions designed for private equity backed, venture funded, and closely held businesses. We blend technical depth with real world experience, enabling management teams and CFOs to navigate compliance, reporting, and planning with confidence. From day one structuring through annual provision and audit support, our corporate tax team ensures every number stands up to scrutiny and every strategy aligns with your long term objectives.

Federal & State Tax Return Preparation

- U.S. corporate income tax returns (Form 1120)
- Consolidated tax return compliance
- Estimated tax calculation, safe-harbor, and payment tracking management
- Tax audit defense and controversy support
- Accounting method reviews and optimization
- Transactional planning for M&A, reorganizations, and restructurings

State and Local Tax (SALT)

- Multi-state corporate income/franchise tax compliance
- Nexus and apportionment studies
- Sales, use and property tax compliance and consulting

M&A and Transactional Tax Services

- Buy-side and sell-side tax due diligence
- Structuring of stock vs asset deals, 338(h)(10), and 754 elections
- Transaction structuring and step plan analysis
- Section 382 limitation, ownership change, and equity event reviews
- Transaction cost analysis and capitalization studies

Tax Planning & Strategic Advisory

- Entity structuring and restructuring analysis
- Federal and state tax planning strategies to minimize liability
- Tax modeling for acquisitions, dispositions, and reorganizations
- Earnings and profits (E&P) studies and repatriation strategies

TAX PROVISION AND FINANCIAL REPORTING SERVICES

- Preparation and review of income tax provisions (ASC 740 and IAS 12)
- Deferred tax asset/liability calculations and analysis
- Quarterly and annual provision support with audit ready workpapers
- Uncertain tax position (UTP) documentation and FIN 48 support
- Audit ready tax footnotes and disclosures
- Coordination with auditors and financial reporting teams

Corporate Tax + Income Tax Provision

Evolved's Corporate Tax Advisory Services

Evolved's Corporate Tax and Provision practice operates as an extension of your finance function, not just a compliance provider. We deliver precision in reporting and foresight in planning, ensuring your ASC 740 provision, return positions, and transaction strategies are aligned from the outset. Our clients trust us to identify risks early, defend positions confidently, and communicate complex issues clearly to auditors, investors, and boards.

With Evolved, you gain a team fluent in both tax code and financial reporting language, one that integrates seamlessly with your internal controls, audit timeline, and leadership expectations. From first year start up to multinational portfolio company, we provide clarity, accuracy, and strategic direction at every step.

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EVOLVED
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FOREIGN REPORTING AND INTERNATIONAL COMPLIANCE

OUR TAX SERVICES FOR FOREIGN BUSINESSES

Foreign businesses operating in the United States may require tax services to ensure compliance with U.S. tax laws. U.S. tax regulations can seem complex to some, but our experienced CPAs and tax professionals regularly assist foreign businesses and investors in approaching these activities with ease.

Supporting multinational entities with a full suite of U.S. foreign reporting and international tax compliance services, guiding clients through complex IRS requirements, and helping them avoid costly penalties.

Tax Planning

Operating in the United States, foreign businesses need to understand the tax implications of their operations and structure their operations in a tax efficient manner. Tax planning can help identify tax saving opportunities and minimize tax liabilities.

Tax Compliance

Foreign businesses operating in the United States are subject to federal, state, and local tax laws. Tax compliance includes filing tax returns and paying taxes on time, as well as maintaining proper documentation to support tax deductions and credits.

Entity Formation

Foreign businesses may need to set up a U.S. entity, such as a branch office, subsidiary, or joint venture, to conduct business in the United States. Each entity type has different tax implications, so it is important to choose the one that best suits the needs of the business.

Withholding Taxes

As a foreign business with U.S. employees or contractors, it's paramount to conquer the world of payroll taxes. Don't let complex regulations hold you back. Maximize your success by diligently withholding and remitting payroll taxes, encompassing federal and state income taxes, social security, medicare taxes, and unemployment taxes.

Sales Tax

With intricate rules varying by jurisdiction, navigating the sales tax landscape can be overwhelming. As a foreign business selling goods and services in the United States, it's essential to stay ahead of the game by collecting and remitting sales tax in accordance with state and industry regulations.

International Tax

Operations conducted in the United States by foreign companies may encounter a range of international tax considerations, including transfer pricing, foreign tax credits, and the application of relevant tax treaty provisions.

Foreign businesses operating in the United States require a range of tax services to meet their obligations and optimize tax planning strategies.

Evolved, Precision, Compliance, and Strategic Tax Insight for Every Stage of Growth

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BUSINESS ACCOUNTING + GENERAL TAX SERVICES

DELIVERING INTEGRATED TAX COMPLIANCE AND BUSINESS ACCOUNTING SERVICES WITH FULL TRANSPARENCY AND TRUSTED GUIDANCE

At Evolved, we provide comprehensive accounting and tax services tailored to dynamic businesses at every stage from early growth start ups to established multi-entity organizations. Our team integrates compliance, advisory, and automation to ensure your books, reports, and returns work together seamlessly. With Evolved, you gain a partner that prioritizes clarity, accuracy, and efficiency giving you confidence in every number and strategy behind it.

Accounting & Financial Reporting

- Full cycle bookkeeping and monthly close support
- Financial statement preparation (GAAP or tax basis)
- Chart of accounts design and implementation
- Cash flow management and forecasting
- Expense classification, accrual adjustments, and reconciliations
- Integration of accounting systems
- CFO level review and financial health dashboards

Financial Process & Technology Integration

- Implementation of scalable accounting processes and internal controls
- Cloud based document management and workflow automation
- Integration between accounting, payroll, and tax software

Outsourced Accounting Department

- Dedicated client accounting and tax advisory team
- Coordination with auditors, lenders, and investment stakeholders
- Year end readiness support and 1099 reporting
- White glove onboarding, client education, and proactive communication

General Tax Compliance

- Federal, state, and local income tax return preparation for businesses and individuals
- Partnership, LLC, and S-Corporation tax filings
- Estimated tax calculation and payment management
- Amended returns, taxable loss carryforwards, and prior year reconciliation
- Fixed asset tracking and depreciation schedules
- Payroll, sales, and use tax compliance coordination
- Consolidated monthly reporting and tax calendar oversight

Tax Planning & Advisory

- Annual and quarterly tax projections
- Owner compensation, draw, and dividend planning strategies
- Entity structure evaluation and conversion support
- Retirement plan and deferred compensation planning
- M&A and transaction tax guidance
- State residency and apportionment optimization
- Cash vs accrual method analysis and accounting method planning

Evolved's Business Accounting & Tax Advisory Services

Evolved's accounting and tax services go beyond compliance, we serve as your outsourced accounting department and strategic financial partner. We build efficient systems that deliver real time insights, helping business owners, CFOs, and investors make confident, data driven decisions. Every client receives tailored reporting, responsive communication, and meticulous attention to detail.

Whether managing daily accounting, forecasting cash flow, or preparing complex returns, Evolved ensures precision at every level. Our model combines automation, accuracy, and advisory, turning your accounting function into a strategic advantage.

Accuracy Reliability Accountability

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OUTSOURCED FINANCE AND ACCOUNTING

YOUR COMPLETE FINANCE DEPARTMENT, REIMAGINED

Evolved's outsourced finance and accounting solution provides more than back office support, it delivers leadership. We integrate with your business at every level, combining accounting accuracy with CFO level insight to strengthen decision making, streamline operations, and prepare you for growth, investment, or exit.

Whether you're scaling rapidly, managing multiple entities, or seeking a fully managed finance function, Evolved ensures your numbers tell the full story, accurately, consistently, and on time. Our proactive team acts as an extension of yours, offering the structure, strategy, and foresight of a true financial partner.

Evolved provides end to end outsourced finance and accounting solutions for growing businesses, funds, and family offices that demand precision, scalability, and strategic insight. We combine the depth of an internal finance team with the efficiency of an external partner, delivering real time visibility, seamless compliance, and financial intelligence that drives better decisions. From bookkeeping to CFO level advisory, Evolved transforms your finance function into a strategic advantage.

Fund Administration, Finance, & Accounting

- Monthly financial statement preparation (Balance Sheet, Profit & Loss, Cash Flow)
- Bank account, credit card, and account reconciliations
- Budgeting, forecasting, and financial projections
- Partnership allocations and capital statement preparation
- Coordination with auditors and financial reporting teams

Back Office Financial Operations

- Payroll processing and payroll tax reporting
- Sales, Use and Property tax compliance and consulting
- Fixed asset tracking and depreciation schedules
- Form 1099 tracking and year end filing

Fund Tax Services

- Partnership allocations and capital account / tax basis tracking
- Quarterly estimated tax projections for funds and investors
- Tax planning for exit events, redemptions, and secondary transactions
- Analysis and reporting of ECI, UBTI, and withholding tax exposure
- Tax distribution waterfall analysis and modeling

Compliance Management Services

- Federal and state tax compliance (partnership, corporate, and exempt entities)
- Compliance calendar management and deadline tracking
- Coordination with fund administrators, auditors, and legal counsel
- FBAR, FATCA and CRS classification and reporting
- IRS and state correspondence and audit support

Fund Launch & Structuring Support

- Guidance on legal entity selection and jurisdictional analysis
- Coordination with legal counsel on fund documents and formation filings
- EIN application and tax ID registration
- Investor portal setup and administration

Investor Reporting & Support

- Custom investor reporting packets (financials, capital account statements, IRRs)
- Responses to investor inquiries on allocations, K-1 & K-3 data, and tax implications
- Foreign investor tax support, including treaty analysis and Form W-8 review



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