DIVISION 07 · EH CAPITAL GROUP INC.

EH CAPITAL
WEALTH MANAGEMENT

Accounting & Tax Advisory Division

FISCAL COMPLIANCE

Regulatory Compliance. Estate Tax Planning. IRS-Aligned Structures.

DIVISION OVERVIEW

The Accounting & Tax Advisory Division provides comprehensive regulatory compliance, bookkeeping, and tax advisory services for EH Capital Group's clients and internal divisions. Leveraging auto-reconciliation and e-filing tools, this division manages estate tax planning, IRS-compliant bond structures, and financial reporting — ensuring every client and division operates with full fiscal integrity and regulatory confidence.

KEY METRICS

Individual, Estate, Corporate Tax Advisory Services	**IRS, State, Federal** Compliance Frameworks
501(c)(3) IRS-Compliant Bond Structures Managed	**Auto-Reconciliation, E-Filing** Reporting Tools

CORE RESPONSIBILITIES

- Provide bookkeeping, tax preparation, and regulatory compliance services for clients
- Manage estate tax planning and IRS-compliant bond structure documentation
- Deploy auto-reconciliation and e-filing tools for efficient financial reporting
- Oversee financial reporting for all 15 divisions and client portfolios
- Advise on tax-advantaged investment strategies and 501(c)(3) compliance
- Coordinate with the Legal Division on fiduciary and governance compliance

FEATURED PROGRAM

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Tax Education Program

The Tax Education Program equips clients and community members with the knowledge to navigate tax planning, IRS compliance, and estate tax strategies. Through workshops, one-on-one advisory sessions, and digital resources, participants gain practical tax literacy that protects and grows their financial legacy.

STRATEGIC GOALS

- → Expand tax advisory services to 1,000+ individual and estate clients
- → Launch a national Tax Education Workshop Series
- → Develop a proprietary tax compliance platform for client self-service
- → Establish a dedicated estate tax planning unit for high-net-worth clients