

The Advisor

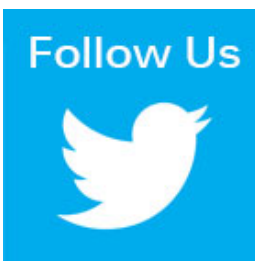
Going Beyond the Numbers to Deliver Insight, Guidance and Success

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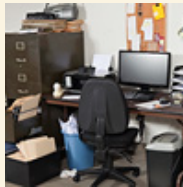
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Records Retention Guidelines to Remember During Spring Cleaning



Spring has finally sprung! Before you start cleaning out your personal or business files, review these guidelines. On the one hand, excess clutter takes up space in your home, office or hard drive — and it could lead to stolen identities if not properly disposed of. But, if you purge too soon, you might not be able to file an amended return or defend against inquiries by the IRS and state tax agencies.

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Family Business

Family Ties are Severed in Stock Sale



Intrafamily stock transfers can have major implications on the net operating loss carryovers of a family corporation. This is due to complex rules that limit such losses when there is a significant change in ownership. In one case, a taxpayer argued that a sale of a large percentage of his stock to his brother shouldn't fall under the rules because they were members of the same family and should be treated as a single shareholder. The IRS disagreed. To learn how the Tax Court ruled, continue reading.

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Management

Take a Proactive Stand Against Harassment



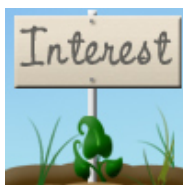
Harassment lawsuits are something your company works hard to avoid, but even the best efforts can fail at times. If an employee does file charges, you can bolster the chances of winning the case by taking certain steps. Conducting a timely, comprehensive investigation shows that your business has a zero-tolerance policy against harassment in all its forms.

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Operations

Be Aware of the Stakeholders in Your Business ... Or You May Regret It



A large part of the success of your business and its related projects depends on getting stakeholders to "buy in." At the very least, you don't want to engage in stakeholder disputes that could lead to unanticipated expenses, bad publicity, delays in projects and litigation. This article helps your business identify its stakeholders and determine the extent of their interests and influence.

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