

Incwell

TAX · CONSULTING

Your Financial Partner for Growth and Compliance

Business Advisory, Tax, Accounting & Consulting

FIRM OVERVIEW

Incwell Tax & Consulting is a New York-based professional services firm serving individuals, families, and small to mid-sized businesses across all 50 U.S. states and internationally. We combine seasoned industry expertise with AI-enabled tools to deliver tax, accounting and advisory services with clarity, precision and accountability.

Headquarters	New York, NY	Website	consultingincwell.com
Reach	All 50 U.S. states and international clients	ITIN service	itinsupport.com
Languages	English · Spanish · Hindi · Nepali	Email	contact@consultingincwell.com
Team	Experienced professionals worldwide	WhatsApp	718-916-4041

CORE COMPETENCIES

Tax filing & compliance

Individual returns (1040, all schedules), business returns (1120, 1120-S, 1065) and multi-state filing.

Accounting & bookkeeping

Full-cycle bookkeeping, payroll, sales tax and quarterly estimated taxes.

Strategic advisory

Tax planning, entity structuring, and strategies for crypto, real estate and retirement.

International & ITIN

1040-NR, FBAR, FATCA, treaty analysis, cross-border work and ITIN through our in-house CAA.

OUR POSITION

Where tax strategy, cross-border structuring and business intelligence meet — so every decision is compliant, deliberate and informed by data.

Services & Engagement.

Three engagement levels, each building on the one before, plus fractional CFO support for businesses that need financial leadership without a full-time hire.

Foundation

Individuals and families

- ✓ 1040 filing (W-2, 1099s, all schedules)
- ✓ Multi-state filing
- ✓ Accounting and bookkeeping
- ✓ Sales tax and estimated taxes
- ✓ IRS notice response

Growth

Small businesses

- ✓ Everything in Foundation
- ✓ Business returns (1120, 1120-S, 1065)
- ✓ Entity structuring and elections
- ✓ Payroll and sales tax compliance
- ✓ Tax planning and projections

Partner

Complex and multi-entity

- ✓ Everything in Growth
- ✓ IRS and state representation (POA)
- ✓ Crypto, real estate and investments
- ✓ Year-round strategic advisory
- ✓ International tax advisory

Fractional CFO

Financial leadership on a flexible engagement

- ✓ Cash flow management
- ✓ Financial reporting and KPIs
- ✓ Investor-ready decks
- ✓ Strategic growth advisory

HOW WE WORK

A transparent four-step process run by experienced professionals and AI-enabled tools — you stay informed and the work moves faster.

01 Discovery

We listen, review your situation and scope the work.

02 Strategy

We analyze your data and map the best approach.

03 Execution

We prepare, review and file — accurately and on time.

04 Support

Year-round monitoring, guidance and proactive planning.

ENGAGEMENT CADENCE

Q1 Jan – Mar

Tax preparation and filing

Q2 Apr – Jun

Extensions and planning

Q3 Jul – Sep

Mid-year check-in

Q4 Oct – Dec

Year-end strategy

Fixed-fee engagements

Quoted in writing once we understand your needs. No surprise invoices.

IRS & state representation

With your signed POA (Form 2848), we handle IRS and state matters on your behalf.



Global Services & Contact.

Whether you are a non-resident filing U.S. taxes for the first time or managing cross-border obligations, we bring clarity to international compliance — with simplicity, fairness and care.

ITIN services

In-house Certifying Acceptance Agent (CAA) · itinsupport.com

- ✓ **W-7 application**
New ITIN with a Certificate of Accuracy (COA), so originals stay with you.
- ✓ **W-7 renewal**
Expired or expiring ITINs renewed correctly.
- ✓ **Dependents and spouse**
ITIN applications for dependents on your return.
- ✓ **ITIN with tax filing**
File your return and apply at the same time.

International tax advisory

For non-residents and cross-border households

- ✓ Non-resident filing — 1040-NR with treaty positions
- ✓ FBAR and FATCA — foreign account compliance
- ✓ Cross-border structuring — dual status, trusts
- ✓ Treaty benefit analysis — reduced withholding
- ✓ Foreign income — FEIE and foreign tax credit planning

WHO WE SERVE

Individuals & families

W-2, 1099, self-employed, gig and freelance — all schedules

Small businesses

Entity structuring, payroll, bookkeeping and compliance

Private wealth

Crypto, real estate, retirement and investment planning

Non-U.S. residents

1040-NR, ITIN, treaty benefits and cross-border obligations

OUR VALUES

Clarity

Plain words and transparent processes, so you always know where you stand.

Precision

Accurate filings, exact figures and deadlines met.

Accountability

Fixed fees quoted in writing. Honest timelines. No surprises.

Partnership

Year-round guidance from people who know your situation.

Ready to collaborate?

consultingincwell.com · contact@consultingincwell.com · WhatsApp 718-916-4041

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