ETON SOLUTIONS

The 2026 Tax Season Survival Guide for Family Offices

Don't just survive the crunch. Build the foundation so you never have to go through this again.



If you are reading this,

It’s likely past 8:00 PM. You are surrounded by spreadsheets, chasing K-1s that haven’t arrived, and manually reconciling bank statements from three months ago. The April 15th deadline is looming, and the margin for error in your Excel models is terrifyingly small.

This guide isn't just about getting through the next few weeks - it's about ensuring this is your last tax season spent in "survival mode."





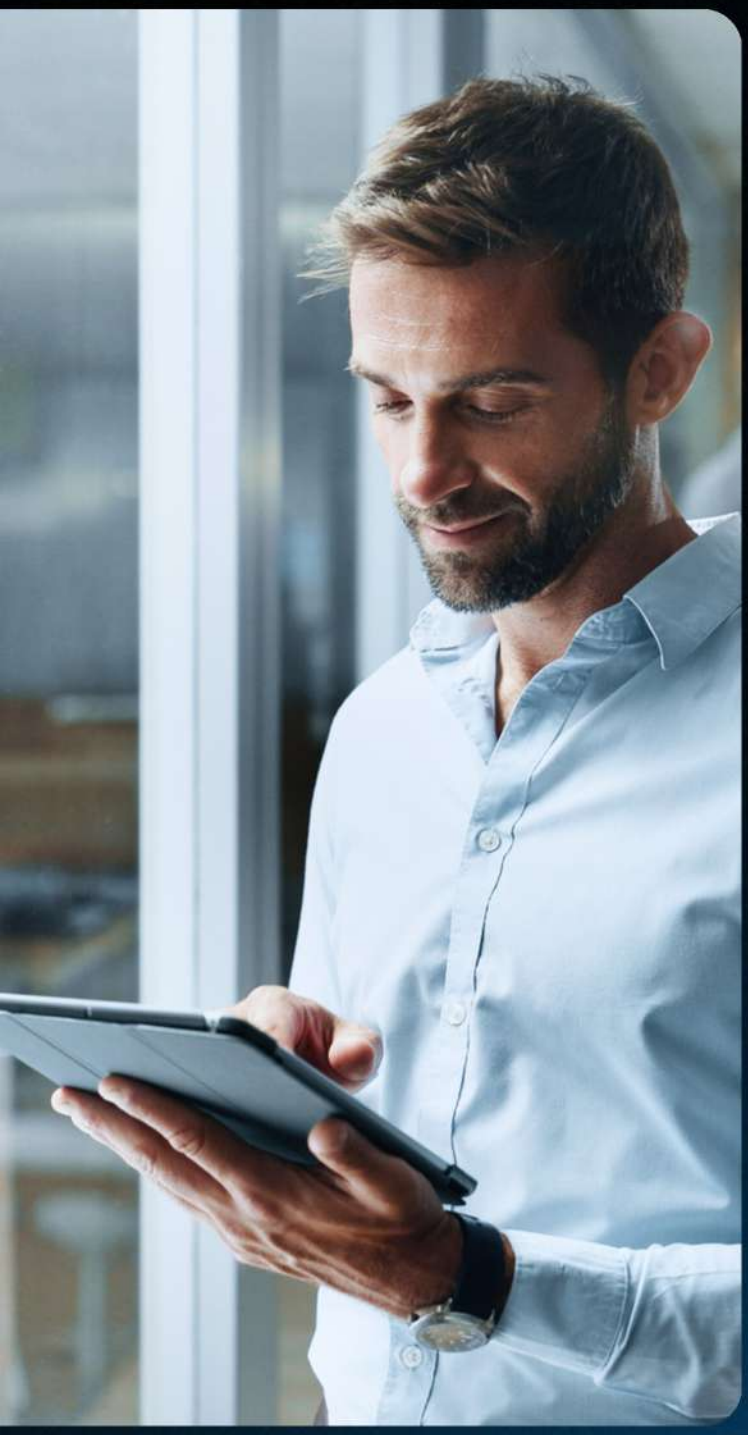
1. The Bottleneck: Why You Are Still Awake

The current model for Family Office tax compliance is broken.
You are likely facing the "Triple Threat" of manual inefficiency:

1. **Data Fragmentation:** Waiting on data from banks, custodians, and private sources that must be manually entered.
2. **Asset Visibility Gaps:** Lacking a real-time view of all investments, specifically hard-to-value private assets.
3. **The Deadline Scramble:** Reacting to filing dates rather than proactively managing compliance.

2. A Better Way: The "Never Again" Strategy

While you can't switch operating systems in the middle of March, you can decide right now that next year will be different. Here is what the "Next Generation" of tax compliance looks like when you leverage AtlasFive® and Eton Tax Support Services:



Automate the Intake (Stop the Chase)

Manual data entry is the enemy of accuracy. You need a system that offers Automated Data Integration.

- **The Shift:** Seamlessly collect and reconcile data from banks and custodians automatically.
- **The Result:** Minimizes manual effort in gathering financial statements and trading data. No more copy-pasting from PDFs.

Unified Visibility (Stop the Guessing)

Are you 100% sure your private asset valuations are current?

- **The Shift:** Use a Unified Asset Dashboard to visualize all investments, real estate, and private assets in real-time.
- **The Result:** Live data insights for preparing and reviewing returns, significantly reducing last-minute stress and providing undeniable accuracy.

Audit-Ready, Always (Stop the panic)

Where is that specific trust deed?

- **The Shift:** A **Secure Document Vault** with advanced encryption.
- **The Result:** Organize critical tax-related documents (wills, deeds, legal docs) so they are audit-ready instantly, not buried in a shared drive.



3. The Economics of Efficiency

Your current manual process isn't just exhausting; it's expensive. Moving to an integrated platform like AtlasFive® isn't just an operational upgrade; it's a financial win.

- **Cost Reduction:** Clients using Eton Tax Support Services consistently achieve **40% to 60% cost savings** on operational tax prep.
- **Scale:** We've supported over **$70 Billion in AUM**, recorded over **20,000 K-1s** (including K-2, K-3),14,000 1099s and processed **10,000+ vendor 1099s**. We know the volume you are dealing with.



4. Your Post-Season Action Plan

You are in the trenches now, but Q2 is your opportunity to change the game.

The AtlasFive® Advantage:

- **Tax Lot Management:** Precise calculation methods for gross income and capital gains.
- **Entity Accounting:** Expert handling of partnership accounting, tax allocations, and tax ledger management.
- **Global Reach:** Whether your assets are in the USA, Singapore, UK, or UAE, we handle the cross-jurisdictional complexity.

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Make a promise to yourself and your team. Survive Q1. Thrive in Q2.

Stop reacting to tax deadlines. Start each tax season with ease with Eton Solutions.

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