
# TRUST & ESTATE

Our team of professionals is committed to understanding individual needs and family dynamics to best tailor our trust & estate services to your goals. The estate planning process can be described as an ongoing journey. Our collaborative approach involves multiple members of our team working closely with you to develop comprehensive solutions that support your entire family. Flexibility and controls allow for the plan to meet the family objectives.

We work with many of the leading banks, trust companies, law firms, and individual trustees. Whether you need one-time accounting or tax return preparation, on-going tax filings, or long-term estate planning, our Trust & Estate team is ready to assist you.

We offer comprehensive trust services, including, but not limited to, revocable, irrevocable, charitable, and more, designed to fit your specific circumstances.

## SERVICES

- Estate planning and tax related estate administration
- Valuation and wealth management services
- Advising on transfer strategies though various vehicles including discounted gifting
- Integrated tax planning tailored to multi-generational families
- Forensic Accounting performed in conjunction with our Fraud & Litigation team
- Quarterly or Annual accountings
- Family Limited Partnerships (FLP)
- Estate return (Form 706) preparation
- Gift Tax (Form 709) preparation
- Fiduciary Income Tax (Form 1041) preparation
- Private Foundation (Form 990-PF) preparation

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