

# TRUSTS & ESTATES



Building and cultivating the right financial strategy to accumulate, manage, preserve, and transfer wealth is of absolute importance. Taxpayers can help shield and protect their financial legacy from state and federal tax risk with careful trust and estate planning. Comprehensive planning can also maximize cash flow to the trust or estate. When the time comes, it is comforting to know your assets will be administered per your wishes and your legacy will be remembered by future generations.

We work with attorneys, personal representatives, executors/trustees, families, and individuals to provide:

## Tax Services

- Preparation and filing of estate and trust, fiduciary income tax returns (Form 1041), including multi-state taxes
- Preparation and filing of an estate's tax return (Form 706), including multi-state taxes
- Preparation and filing of a decedent's final income tax return, including multi-state taxes
- Preparation and filing of federal gift tax return (Form 709)
- Preparation and filing of federal generation skipping tax return
- Multi-state income apportionment and filing requirement issues
- Prompt determination filing
- Estate, trust, and gift tax planning
- IRS audit support
- Conservation easements

## Audit & Assurance

- Financial statement audits, reviews, and compilations
- Internal control reviews
- Fraud investigations and risk management
- Agreed-upon procedures

## Client Accounting Services

- Construction/reconstruction of accounting records
- Accounts reconciliation
- Family office services, including bookkeeping and expenses management
- Payroll processing, filings, and reporting for employees of the trust
- Personal financial statements
- Beneficiary allocation determinations

## Consulting Services

- Business planning, financial projections, and budgets
- Business valuations
- Cash flow management
- Entity set-up and organizational structure
- Business purchase, sale, and merger/acquisition
- Wealth and succession planning
- Retirement planning
- Management consulting
- Ownership transfer planning (buy-ins/buyouts)



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