

Estate Planning Services

Guidance and strategies for preserving and transferring wealth

Our estate planning services are provided by our group of financial professionals who are experienced in the estate and succession planning industry. We have the resources of a large financial organization coupled with the kind of personal attention and service you would expect from a small company. We also have a great deal of experience working effectively in collaboration with our clients' other advisors.

What Clients Can Expect From Us

We know how hard you've worked to accomplish your goals and to distribute your wealth in the way you desire. You can expect us to use our resources and skills to help you enhance your wealth and protect your assets from loss due to estate taxes. We're team players with one goal in mind: to collectively help create a lasting legacy for your family, including tax-efficient strategies that work for you now and in the long-term.

Services & Benefits

We have a complete range of services to review, analyze, project, implement, and monitor your estate planning needs.

Our Estate Planning Services Include:

- Review of current assets and liabilities—in terms of value as well as how they are owned
- Assess your goals for the transfer of assets
- Compare your goals for the transfer of assets with the actual outcome from your current estate planning documents
- Identify and present available options to reduce estate settlement costs and provide for more efficient transfer of wealth
- Work with your other advisors to implement any changes in your estate plan
- Keep you informed of any tax provisions or tax changes that impact your estate plan
- Monitor your plan through periodic review to ensure that it accomplishes your objectives
- Take action to make any required changes in response to significant life events
- A hypothetical projection of potential estate settlement costs at death
- Determine estate assets available to pay estate settlement costs, as well as any debts or bequests

You Can Count On Us To:

- Translate your goals into strategies that allow you to preserve and transfer your estate effectively
- Maintain a high degree of collaboration and communication—both with you and your other advisors
- Respond quickly to your requests
- Help you be proactive in updating your estate plan due to changing life circumstances, regulations, and tax policy
- Efficiently handle the details and free you from the day-to-day concerns of protecting your wealth so that you can devote more time to your business, your personal endeavors, and your family
- Respect your privacy. Above all, we value your trust and keep all information that we collect strictly confidential.

Value Added Advantages

We thoroughly understand the issues and needs that you face in the transfer of your wealth. Our financial professionals are well acquainted with techniques for reducing estate and gift taxes and potentially increasing the value of assets transferred to your heirs. We recognize that while estate settlement expenses cannot entirely be avoided, we can offer our clients efficient strategies to minimize these costs.

Estate & Life Planning Strategies • Employee Benefits Planning • Wealth Management & Financial Strategies

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