



Estate and Trust Services



Planning for the Future

For many people, the last thing they want to deal with is estate planning. The process can be unpleasant and it often requires difficult decisions. If a family business is involved, the issues are usually even more complicated.

Without proper planning, a person can lose over half of their accumulated wealth due to high estate tax rates. Minimizing taxes and maximizing the transfer of wealth is the primary goal of estate planning.

Preserve your Wealth for Future Generations

Estate planning is an essential component to managing your assets during your lifetime and providing future financial security for your family and loved ones. Wilkin & Guttenplan's estate and trust planning specialists will work with you to create an estate plan that meets your objectives. Over the course of the planning process, you receive personalized attention from our professionals as they help you devise and implement an effective plan. The strategies we use may involve managing your assets, setting up trusts for your children, sheltering your estate from taxes and finding gifting opportunities to family and/or charities. For business owners, we will also explore business continuity through ownership succession.

Providing Answers and Resolving Issues

During the planning process, we will help you answer questions such as:

- How can I preserve the wealth that I have accumulated?
- What do I want to have happen with my assets?
- What do I want done with my business?
- What is the smartest way to leave donations to my favorite charities?

We can work with you to address:

- Administration of trusts
- Ascertaining family goals regarding the preservation of wealth
- Planning for the minimization of taxes
- Guiding in the inventorying of estate assets
- Managing issues commonly associated with closely-held businesses such as valuations, alternative methods of paying estate tax and the transfer or disposition of business interests
- Planning for special needs and under-age children
- Retirement planning
- And much, much more...

Putting our Experience to Work for You

Estate planning can be an enormously complex matter. It is imperative that you work with people who thoroughly understand your financial picture and have the necessary technical expertise.

Since 1983, the experts at Wilkin & Guttenplan have provided services to many clients just like you. We are committed to helping you with the complications often associated with estate and trust planning. We welcome the opportunity to put our expertise to work for you.