

# ESTATE AND TRUST

*Last Will and Testament*

## PLANNING FOR THE FUTURE

Estate planning is an essential component to managing your assets during your lifetime and providing future financial security for your family and loved ones. For many people, the process of estate planning can be unpleasant as it often requires making difficult decisions. But, without proper planning, a person can lose over half of their accumulated wealth due to high estate tax rates. Therefore, at WilkinGuttenplan, our goal is to minimize taxes and maximize the transfer of wealth for clients.

## PRESERVE YOUR WEALTH FOR FUTURE GENERATIONS

Our experienced estate and trust planning specialists collaborate with clients to create an effective plan that meets their objectives and preserves their family's wealth. During the planning process, WilkinGuttenplan provides personalized attention and a strategic plan that may involve services such as managing your assets, setting up trusts for your children, sheltering your estate from taxes, and find gifting opportunities to a family or charity. For business owners, we will also explore business continuity through ownership succession.

## PROVIDING ANSWERS AND RESOLVING ISSUES FOR OUR CLIENTS

### During the planning process, WG 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:

- Planning for the minimization of taxes
- Administration of trusts
- Preparation of gift, trust and estate income tax returns
- Planning for special needs and under-age children
- Guiding in the inventorying of estate assets
- Ascertaining family goals regarding the preservation of wealth
- 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
- Retirement planning
- Litigation Support