

Planning for your estate can be unpleasant for many, often requiring difficult decisions. The issues are usually even more complicated if a family business is involved. 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 a primary goal of estate planning.



PRESERVE YOUR WEALTH FOR FUTURE GENERATIONS

Estate planning is critical to protecting your assets, minimizing estate taxes, and ensuring the efficient transfer of wealth to future generations—especially when a family business is involved. We provide tax-efficient estate and gift planning, trust administration, fiduciary income tax compliance, special needs and minor planning, asset inventory and wealth preservation strategies, closely held business valuation and succession planning, retirement planning, and litigation support.

✔ We can assist with the following forms:

- Form 706, United States Estate (and Generation-Skipping Transfer) Tax Return
- Form 709, United States Gift (and Generation-Skipping Transfer) Tax Return
- Form 1041, US Income Tax Return for Estates and Trusts
- Form 5227, Split-Interest Trust Information Return
- Form 1041-A, US Information Return Trust Accumulation of Charitable Amounts

✔ WG will help you answer questions like:

- 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 most innovative way to leave donations to my favorite charities?

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. For over 40 years, WilkinGuttenplan has provided services to clients like you. We are committed to helping you with the complications often associated with trust and estate planning. We welcome the opportunity to put our expertise to work for you.