

We help you create an estate plan that will best anticipate and arrange for the distribution of your assets and execute your desired last wishes. We evaluate your estate, gift and trust planning as one comprehensive plan.

Additionally, we know that as your life changes, new circumstances should be mirrored in your overall estate planning and documentation. We facilitate this process by working closely with your attorney or you can talk to our in-house estate attorney Bernard L. Salamone in order to create an encompassing plan that will best reflect your desired plan.

### **Our services include:**

- Review of your wills, trust documents and investment assets and liabilities
- Implementation of tax-saving strategies to existing and new estate plans
- Creation of charitable or other gifting programs
- Initiation of strategies to help minimize your estate and gift taxes
- Assistance with estate administration