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edelsteincpa.com

edelstein
accounting for you

Trusts and Estates

IT TAKES A LIFETIME

You've worked a lifetime to build your wealth so you can provide security for your retirement and for your family when you are gone. This wealth may include a business you built from the ground up, including investments, real estate and more.

Unfortunately, it doesn't take long to deplete assets when confronted with the need for long-term care or other unforeseen demands. Additionally, taxes can greatly diminish the size of your estate upon your death. The greater your assets, the more challenging it becomes to safeguard your wealth.

You need a plan

No matter where you are along life's journey, we can help you create a customized estate plan to accomplish your personal goals, including:

- Preserving assets for retirement
- Maximizing the amount you can distribute to your family, future generations and charitable institutions upon your death
- Distributing your estate according to your wishes and the specific needs of individual family members
- Providing for the transition of a family-owned business from one generation to the next with less stress and turmoil
- Creating a legacy for future generations

It's personal

Our advisors get to know you, your family, your business and your goals intimately. In this way, we create an estate plan that reflects your dreams and desires. Our experts use sophisticated tax planning strategies and tools to achieve your goals. They can help:

- Estimate tax liability under current and proposed estate plans and evaluate alternatives
- Establish the value of a business and identify ways to transfer ownership and assets
- Prepare tax returns for a wide variety of trusts, including charitable and personal residence trusts
- Implement tax effective strategies, such as gifting and charitable planning to transfer wealth

Don't leave the fate of your estate up to chance. With our assistance, you can create a comprehensive plan you easily modify over time as your situation and needs evolve.

To learn more about how we can help, contact **Scott Kaplowitch** at 617-227-6161.

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