Estate Planning

As tax and legal systems reach new levels of complexity, proper estate planning becomes critical to estate preservation. At Case | Sabatini, we help clients form lifetime transfer plans to reduce estate taxes and maximize family assets. By combining our income and estate tax experience with a clear understanding of our client's long-term financial goals, Case | Sabatini goes beyond the numbers to see how today's tax rulings will impact your business, your family and your personal estate. At Case | Sabatini, we will:

- Review present wills and trust documents
- Suggest alternatives to current estate plans and calculate tax savings
- Review a closely-held business for proper valuation and future transfer
- Review retirement plans and life insurance benefits
- Identify potential liquidity problems caused by federal and state death taxes
- Help develop a lifetime gifting program through family-limited partnerships, charitable trusts, and qualified personal residence trusts.
- Prepare returns to assist with the probate process and final estate accounting, including gift tax returns, final individual tax returns, federal and state estate tax returns, and trust returns.

CASE | SABATINI

www.CaseSabatini.com