



Estate Planning and Administration

No one likes to think about it, but legacy planning is a crucial exercise to accomplish. Having created a plan, you and your family can know that decisions have been made to ensure your wishes are understood and implemented after you are no longer available to supervise. Our Personal Financial Services team can help you plan for your estate's management. Our experienced professionals serve you with your best interests in mind.

Are you...

Uncertain where your assets will go and how they will be managed upon your death?
Concerned that your loved ones will be provided for adequately?
Wondering if your wealth transfer plan accomplishes your goals?

Evaluating asset ownership within the family structure?
Confused by the ever-changing estate tax laws?
Overwhelmed by the number of estate-planning vehicles available?
Interested in better monitoring your financial objectives relating to your estate plan?

Solutions

Our Personal Financial Services team relies on our extensive wealth planning knowledge to bring integrated estate planning strategies to the table. Once your specific needs are identified, we will work with you and your team to formulate solutions which may include:

Comprehensive estate planning
Wealth transfer planning and monitoring
Coordination of legal, investment and other professional advisors
Probate administration filings

Estate and fiduciary tax compliance
Trust funding analysis and assistance
Planning for beneficial timing of payments to heirs
Assistance to estate fiduciary regarding elections, valuations, and tax planning opportunities for heirs

Elliott Davis

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