



Personal Financial Services

Your individual finances must be handled with care. You want to reach your goals and safeguard what is important to you. Helping you effectively manage your personal financial situation through income, estate planning and related compliance services is the key objective of our Personal Financial Services team. Our experienced professionals serve you with your best interests in mind.

Are you...

Dealing with complex transactions or anticipating them in the future?
Looking to develop a succession plan for your business?
Evaluating gifting strategies to maximize benefits?

Without a bookkeeper or controller?
Interested in better monitoring your financial objectives relating to your estate plan?
Needing assistance reviewing your estate documents to ensure you are meeting your goals?

Solutions

Individual Income Tax Planning and Compliance

- Annual tax projections
- State and local income tax planning
- Tax compliance

Closely-held Family Business Planning

- Succession planning
- Compensation planning
- Business valuation services

Philanthropic Planning and Compliance

- Identification of charitable vehicles
- Exempt organization tax return compliance
- Evaluation of income and estate tax implications and savings

Family Office Services

- Facilitation of family wealth and tax planning meetings
- Bill payment and household employee payroll services
- Coordination of legal and investment services

Estate Planning and Compliance

- Comprehensive estate planning
- Wealth transfer planning and monitoring
- Coordination of legal, investment and other professional advisors

Trust and Estate Administration

- Probate administration filings
- Estate and fiduciary tax compliance
- Trust funding analysis and assistance

Elliott Davis

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