ESTATE TAX ANALYSIS

WHAT IS ESTATE TAX ANALYSIS?

Estate Tax Analysis provides a detailed calculation of potential federal and/or state estate taxes associated with your estate upon death, by a qualified estate planning expert. The process includes a comprehensive cash flow analysis and asset performance modeling to estimate potential tax liability at life expectancy. Because of your relationship with our firm, this service is offered to you at no cost.

Maximize Wealth Transfer
The process includes identification of inefficiencies that could expose assets to federal and state transfer taxation which could ultimately reduce the legacy left for intended heirs.

Consideration of Alternative Planning Strategies
The process includes an analysis of current estimated estate taxation as well as a projection of future estate tax associated with your estate, allowing you to consider strategies that minimize liabilities at death.

Essential Tool For Your Planning Professionals
Estate planning professionals provide their expertise in making recommendations to meet your planning objectives. This analysis supplies them with vital information to further understand your situation and allows them to make the most appropriate recommendations to best achieve your goals.

GATHER INFORMATION

Submission of a completed Information Gathering Kit provides the necessary data to initiate the process.

ANALYSIS

Analysis includes a review of (1) your current estate tax exposure, (2) future estate tax exposure, and (3) more efficient planning alternatives.

RESULTS MEETING

The estate planning expert will present a detailed Estate Tax Analysis report to you (and your professional advisors) identifying your estate's exposure to estate taxation and, when appropriate, facilitates strategy discussions with your professional advisors.