



Estate, Trust and Gift Taxation

Effective Planning Strategies

You have worked for years to accumulate wealth, taken risks that reaped rewards, spent decades building your business or perhaps come into a newly found wealth due to the death of a loved one. Without an appropriately thought out and well documented estate plan, your desire to ensure how your hard earned assets are distributed after your incapacity or upon your death can quickly fall apart or lead to disputes. Hancock Askew has a dedicated group with expertise to help you proactively plan and the ability to anticipate the less than obvious issues that can arise in assuring your intentions are followed.

Creating an Estate Plan

Our goal is to preserve family wealth and optimize the transfer of that wealth upon death. Whether you are a high net worth individual whose estate plan includes several trusts, the newly named and inexperienced executor of a family member's estate, a parent wanting to gift a sizable portion of a down payment to a child, or anyone else with a question about trusts, estates, and gifting, Hancock Askew stands ready to help.

We will help you understand the strategies and implications of your estate and gifting plan. We also will help you comply with the sometimes confusing filing requirements and fiduciary responsibilities of estates and trusts. We work in coordination with your attorney and other advisors to ensure that your estate and gift plan minimizes estate and gift taxes while carrying out the objectives of the plan. And we ensure that you comply with all tax filing requirements

The Next Step

Explore your options. Visit our website to learn more about how we can work together for your success.

www.HancockAskew.com

Services Include:

- Income tax preparation for grantor trusts, irrevocable trusts, credit shelter trusts, marital trusts, children's trusts, special needs trusts, and charitable remainder trusts
- Preparation of Crummy letters
- Estate tax return preparation, estate income tax returns and assistance with estate administration
- Gift tax return preparation for lifetime giving and generation skipping allocations
- Estate and gift tax planning
- Trust accounting and reporting

Do You Have an Estate Plan?

At Hancock Askew, we have experts available to help you ensure your estate plan is up-to-date and complies with all tax requirements.



HANCOCK ASKEW & CO LLP
ACCOUNTANTS & ADVISORS