BaldwinClarke

— Planning has its rewards. —

ESTATE & WEALTH TRANSFER PLANNING

Transfer planning begins by assisting you in the formulation of your distribution goals. Projecting and analyzing your asset base will a) determine what your legacy will be, and b) determine what the potential tax consequences will be. The ultimate objective is to enable your family to inherit your legacy of property and money, designated by your will, in a manner that perpetuates your values and ideals. Further, we seek to protect your assets from estate taxes, creditors, and lawsuits.

It is easier to plan your distribution knowing what the potential amount may be available for distribution. Tax reduction strategies will be incorporated to show the impact on your situation.

The planning process can also extend beyond financial and legal document creation to include family meetings regarding family values, wealth planning education and stewardship of family wealth. Finally, as part of your planning team, we assist and guide the implementation provided by your legal and accounting professionals.

The legacy you leave says a lot about the life you led. We will help you preserve and perpetuate your wealth by advancing your visions, values, and worth for future generations.

What We Do

- Explore your estate distribution objectives in detail.
- Review and summarize your existing estate and business transfer documents, as well as financial and insurance assets.
- Identify estate planning gaps and problem areas.
- Analyze estate planning opportunities to reduce taxes and meet distribution and family objectives.
- Create a business continuity plan that integrates with your estate plan.
- Explore charitable giving opportunities to benefit you, your heirs and charities.
- Provide oversight and assistance with plan implementation.
- Collaborate with any outside professionals, such as your attorney or CPA, during plan preparation and implementation.

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