ESTATE AND TRUST PLANNING

PROTECT WHAT MATTERS MOST

THE WARREN AVERETT EXPERIENCE

Warren Averett estate planning advisors provide a comprehensive and personalized approach to your family's estate planning, income tax planning and compliance needs. We believe a thorough understanding of your personal and professional situations best position us to recommend strategies and solutions that are customized for you and your family. The following is an overview of our personalized approach.

IDENTIFYING YOUR GOALS

We will help you identify and clarify your estate planning goals while ensuring these goals center on preserving your family's wealth.

REVIEWING YOUR CURRENT SITUATION

We will analyze your financial position, as well as gain an understanding of your family and business dynamics. As part of our comprehensive and personalized approach, we will review your existing will and trust documents and listen carefully to your desired family legacy. We will review your family's assets and discuss where your wealth will go, both in value and in actual transfer.

DEVELOPING ESTATE PLANNING STRATEGIES

After reviewing your current personal and professional situations, we will develop and evaluate strategies to fulfill your needs by balancing competing personal and financial goals.

BUSINESS SUCCESSION PLANNING

We will also analyze your current business structure and will help to develop a succession strategy for passing control of your business to the next generation, as well as ensuring that the value of your share in the business is realized by your estate beneficiaries.

COORDINATING THE ESTATE PLANNING TEAM

We will work closely with the various advisors on your estate planning team to ensure that your estate and financial plans are properly implemented.

> Our strength as an estate and trust group lies within our combined specialized experience and niche practice commitment.
>
> — Greg Sellers, *Warren Averett Member and Past President of the National Association of Estate Planners & Councils*

Warren Averett
CPAs AND ADVISORS

IMPLEMENTING AND MONITORING

Implementing estate planning can take time and require the involvement of your various advisors. We will communicate with your team to help coordinate the estate planning process, such as the selection of an attorney to draft documents, the transfer or retitling of assets, gifting programs or purchase of insurance. Most importantly, we will continue to monitor changes in your family's health, business and other life situations to assess the continuing validity of your estate plan and its relevance under the law.

ESTATE AND TRUST ADMINISTRATION

Our advisors assist personal representatives and trustees in the day-to-day administrative duties associated with serving in these roles. Additionally, we have the skills and expertise to prepare and file federal and state estate tax returns, fiduciary income tax returns, federal gift tax returns and individual and business income tax returns.

OUR EXPERTISE AND STRENGTH

We have a dedicated group of professionals focused exclusively on the specialized area of estates and trusts. With the combined experience of more than 100 years, our trusted advisors include credentialed professionals designated as CPAs, JDs and AEPs.

ESTATE AND TRUST PRACTICE SERVICES

- Succession planning for family-owned businesses
- Special needs planning
- Charitable planning and giving
- Estate and income tax planning
- Review of existing estate planning documents
- Determining estate liquidity
- Estate or trust court accountings
- Estate and trust administrative support services
- Tax return compliance
- Insurance review and planning
- Insurance trust administration

For more information about how we can help you achieve your estate planning goals, call us at 800.759.7857 or visit our website at www.warrenaverett.com/estateplanningteam.

Warren Averett
CPAs AND ADVISORS

ALABAMA Anniston | Birmingham | Cullman | Foley | Homewood | Huntsville | Mobile | Montgomery
FLORIDA Destin | Fort Walton | Panama City | Pensacola | Tampa
GEORGIA Atlanta