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, estate and income tax planning and compliance needs. We believe a thorough understanding of your personal and professional situations (your family dynamics, finances, business, lifestyle and goals) best positions 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. We will help you ensure these goals center on preserving your family's wealth and on directing the disposition of your family's assets, while reducing potential estate and income tax liabilities.

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 then listen carefully to your desired family legacy and the intent of your estate. 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.

COORDINATING THE ESTATE PLANNING TEAM

We will then work closely with the various stakeholders on your estate planning team—attorneys, financial or investment advisors, insurance agents, bank trust officers and others as needed—to ensure proper implementation of your estate and financial plans. We collaborate with you and your estate planning team so that your plans are executed in your best interests and help prepare you and your family to adapt to life changes.

"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 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 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
- Tax return compliance
- Insurance review and planning
- Insurance trust administration

For more information about how we can help enhance your estate plan, call us at 800.759.7857 or visit www.warrenaverett.com/estateplanningteam.