ESTATE AND TRUST PRACTICE

# PROTECT WHAT MATTERS MOST

**Warren Averett provides tax planning and compliance services that require a specialized understanding to the dynamics of your entire life—family, finances, business, lifestyle and goals. We will work with you to identify and clarify your goals, project tax and other consequences and recommend strategies to balance solutions.**

## IDENTIFYING YOUR GOALS

We will help you identify and clarify goals that center on preserving and directing the disposition of your assets, while reducing potential estate and income tax liabilities and providing for adequate liquidity.

## REVIEWING YOUR CURRENT SITUATION

In order to determine your needs, we will analyze your financial position, as well as gain an understanding of your family and business dynamics. As part of our personalized approach, we provide a detailed review of existing will and trust documents and then listen carefully to your desired intent related to your estate. We review assets and discuss where your wealth will go, both in value and in actual transfer.

## DEVELOPING ESTATE PLANNING STRATEGIES

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

## COORDINATING THE ESTATE PLANNING TEAM

We will work with the various members of your estate planning team – attorneys, insurance agents, investment professionals, actuaries, appraisers and others – to ensure proper implementation of the strategies developed and to assure all important concepts are included in the overall plan.

**35 TRUSTED ADVISORS**
offering personalized estate planning solutions

## IMPLEMENTING AND MONITORING

Implementing estate planning can take time and the involvement of your various advisors. We will communicate with the estate planning team to coordinate such activities 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 on an ongoing basis to assess the continuing validity of the estate plan.

Warren Averett
CPAs AND ADVISORS

## ESTATE AND TRUST ADMINISTRATION

Our professionals 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 Accredited Estate Planners, Personal Financial Specialists and Certified Financial Planners®

"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*


## ESTATE AND TRUST PRACTICE SERVICES:

- Succession planning for family-owned businesses
- Special needs planning
- Charitable giving
- Life insurance and long-term care planning
- Estate and income tax planning
- Retirement and wealth management planning
- Review of existing estate planning documents
- Determining estate liquidity
- Comprehensive financial planning
- Estate or trust court accountings
- Tax return compliance

For more information on how Warren Averett can enhance your personal estate plan, contact one of our professionals at 800.759.7857 or visit www.warrenaverett.com.

Warren Averett
CPAs AND ADVISORS