EisnerLubin llp
certified public accountants and advisors

Trust & Estate Planning

It is never too early to consider customized legacy planning.

Wealth transfer planning seeks to protect your family's assets while assuring a smooth and timely transfer to your beneficiaries in the manner you choose. But planning should also take into account retirement and the enjoyment of assets you have worked so hard to accumulate. EisnerLubin has assisted multiple generations of clients to ensure the maximum amount of wealth passes from one generation to the next with the smallest possible tax burden.

Frequent changes in the tax law necessitate that you have a professional advisor well-versed in all the latest planning techniques. Estate and gift taxes can command a large share of one's estate. Fortunately, many tools are available which can mitigate the effects of these taxes. The experts at EisnerLubin will tailor a plan to minimize your tax liability and meet your requirements professionally and with the utmost confidentiality.

Our trust and estate planning tools and services include the following:

- Review and financial analysis of trust instruments and wills
- Estate and gift tax filings
- Fiduciary taxation and accountings of trusts and estates
- Pre- and post-mortem tax planning
- Business succession planning
- Family limited partnerships
- Private foundations
- Charitable split-interest trusts
- Life insurance trusts
- Grantor annuity trusts
- Personal residence trusts
- Generation-skipping trusts
- Asset protection trusts

Also, should the need arise, keep in mind that EisnerLubin can provide assistance with estate and trust administration and settlement services, including preparation of all related tax filings.

Are you ready to begin the planning process? Please contact Al LaRosa at 212 829 3205 or email him at alarosa@eisnerlubin.com.