

Estate Planning Services



ALPERN ROSENTHAL
INSPIRING OPPORTUNITIES

Capabilities

Developing the right estate plan is the best way to ensure your legacy to your family, friends and favorite charities. The right plan will identify potential estate and gift taxes and be structured so as to eliminate or minimize those taxes over the life of the plan - leaving more for your intended beneficiaries. Equally as important, it will provide you with effective strategies for the continued accumulation, conservation and enjoyment of wealth during your lifetime. When enlisting our services, you will be partnering with our seasoned team of specialists who work closely with clients to provide creative yet practical solutions that make a difference to our clients.

To develop the right plan, our professionals work with you to develop strategies designed to accomplish your objectives,

dedicated

demonstrate the “tax impact” of the various alternatives you are considering and help you to decide on the best plan for you and your beneficiaries. At Alpern Rosenthal, we are an innovative firm dedicated to shaping the long-term relationships that have advanced our clients’ goals.



Our services include:

- Identification of family objectives and needs regarding wealth preservation
- Review of current wills, trust instruments, schedules of assets and related documents
- Development of alternatives to the current estate plan and quantification of potential tax savings
- Planning for assets with unique tax attributes, including retirement plans and life insurance benefits
- Examination of privately-held business issues such as valuation and business succession planning
- Development of lifetime gifting program utilizing appropriate vehicles such as:
 - Family Limited Partnerships
 - Limited Liability Companies
 - Charitable Trusts
 - Life Insurance Trusts
 - Qualified Personal Residence Trusts
- Development of strategies dealing with federal and state estate taxes and generation-skipping transfer tax
- Preparation of federal and state tax returns
- Proper implementation and administration of the estate plan
- Preparation of estate and trust income tax returns
- Postmortem tax planning and assistance to surviving heirs

For more information, contact Emanuel V. DiNatale, CPA, Shareholder and Director of Estate Planning Services, at 412.281.1001 or edinatale@alpern.com.

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