



CITRIN COOPERMAN®

Attest & Assurance | Tax Compliance & Research | Specialty & Consulting

Trust and Estate Planning



Helping entrepreneurs and business owners realize their legacies.

Planning for the distribution of your estate can be a daunting task. Complex laws and tax rules surrounding trusts, estates and inheritances require careful planning and sometimes, tough decisions. Our professionals have years of experience in helping clients effectively arrange for their desired legacy to pass on to families and charities. We can look at your financial situation in the immediate and long-term to help you understand the impact of your decisions on your estate and your future beneficiaries.

Our Trust and Estate Planning services include:

- ▣ Family office services
- ▣ Fiduciary counseling
- ▣ Multigenerational wealth transfer
- ▣ Private foundations and charitable trusts
- ▣ Trust monitoring and administration