

Estates & Trusts Group

Estate planning rules are complicated and ever-changing. It is important to have a professional examine your estate planning goals. Professionals in our Estates & Trusts Group devote over 95% of their time providing trustees, executors, business owners, and other clients with tax planning and consulting services, business succession planning, formal and informal court accountings, and fiduciary tax preparation services.

Benefits to Our Clients

Peace of mind knowing that more of your hard-earned money will be given to your loved ones and not to Uncle Sam.

Reduced taxes paid upon the transferring of your assets to your family members.

Knowing your estate plan and documents are in order for those you leave behind.



Important Questions to Ask Yourself

- Do you have a will that demonstrates your most recent intentions?
- Do you want to retain control of your assets during your lifetime?
- Are you concerned about paying excess gift and/or estate tax to Uncle Sam?
- Do you want to maximize the amount of your assets that pass to your loved ones?
- Do you have enough liquidity to pay estate tax?
- Will the people you desire to receive your assets actually receive them upon your death?
- Do you have enough insurance to cover your estate liquidity needs?

Our Services

Tax Planning & Consulting

- Estate - Includes reviewing wills and preparing written recommendations and computing tax projections
- Gifting - Includes developing and implementing charitable giving strategies and wealth transfer strategies to family members
- Fiduciary - Includes reviewing trust instruments and preparing written recommendations and opinions

Business Succession

- Recommendations regarding funding of buy-outs, including tax analysis of Buy/Sell Agreements
- Analyze tax ramifications of proposed transfers
- Determine accurate valuation strategy of your business

Accounting

- Provide formal Surrogate Court accountings
- Prepare informal Trust and Estate accountings
- Determine beneficiary allocations

Compliance

- Federal & State Fiduciary Income Tax Returns for Trusts and Estates
- Preparation of Gift Tax Returns and Estate Tax Returns
- Decedents Final Tax Return

The Insero Difference

Entrepreneurial spirit. We are a firm of entrepreneurs focused on your business. Our partners, managers and staff know that our clients don't really win unless we are adding value with new ideas, insights and solutions tailored for you.

A deep and technical bench. When you work with Insero & Co. CPAs you don't just get one person, but a whole team of state, federal and international tax, accounting, audit, SEC, and enterprise risk management experience to meet your current and future needs.

Our team is proactive and innovative. We meet with our clients regularly to understand their businesses and we bring ideas to the table. Your client service team will candidly outline benefits, risks, opportunities and challenges created by every idea. We also respect that you should be involved in the decisions about which ideas to implement.

A concentrated effort by our partners. While heavy involvement by the partner team is a simple concept, most accounting firms refuse to employ it. Our service approach will make you feel like our most important client.

The resources of RSM US LLP. Insero & Co. is proud to have been chosen as an integral member of the RSM US Alliance. This enables us to provide you with the technical resources of a national firm, without their involvement in our day-to-day operations. They do not take the decision making ability away from our local partners.

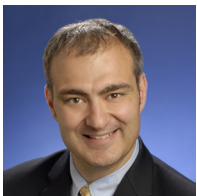
What Does It Mean to Have a Higher Standard?

We believe the greatest successes are not born from a single event. They are the result of hard work, planning, tenacity, passion, and focus. They grow without compromising—heralding honor, respect, and admiration through the business world and throughout the community.

They set a higher standard for all.

It is this standard that we bring to every client and every aspect of their business. Through our partnership and leadership we aim to help these clients continue to achieve great successes that can be measured in more than just dollars.

For more information, please contact:



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