ESTATE & TRUST PLANNING

Your Estate Plan Should Be as Unique as the Life You Live

We realize that an estate plan is more than tax minimization strategies—it is planning to pass your legacy to your loved ones according to your unique needs and wishes. We have assembled a team with **extensive experience, expertise and insight to provide you peace of mind** throughout the complex and personal process of estate and trust planning. Effective estate planning is built upon a multidisciplinary approach and is not an isolated one-time event. Updating your estate plan is just as important as creating one. It is a continual **process to assist you in ensuring that your legacy remains viable** long into the future. This is exactly why we provide personal service and a thoughtful team approach by **collaborating with all of your advisors,** including your attorney, financial advisor, insurance provider, trust officer and others to preserve your short- and long-term goals. In the end, our goal is to **ensure that your estate and trust planning goals are fulfilled** in the most tax-efficient manner possible.

BMSS
Advisors & CPAs

(833) CPA-BMSS | www.BMSS.com

ESTATE & TRUST PLANNING

How Do We Serve **Clients Like You?**

- Collaborate with your advisors to develop your comprehensive wealth preservation and transfer plan
- Compliance for estate, gift and income taxes to minimize overall liabilities for the family unit
- Provide accounting assistance to follow through with executor and trustee fiduciary responsibilities
- Charitable and philanthropic planning, including charitable trusts and family foundations
- Assist with selection of trustees, guardians and personal representatives

Services We Provide

- BUSINESS SUCCESSION PLANNING
- ASSET PROTECTION PLANNING
- REVIEW ESTATE PLANNING AGREEMENTS
- PHILANTHROPIC GIFT PLANNING
- TAX PLANNING & COMPLIANCE

EXPERTISE

In addition to the CPA designation, our estate and trust advisors hold the Accredited Estate Planner (AEP®), Certified Financial Planner (CFP®) and Certified Valuation Analyst (CVA®) designations.

Since launching our estate and trust planning practice in 1997, we have worked with estates that range from **$1 million up to $200 million** in assets.

Service Relationships

- Estate Planning Council of Birmingham
- National Association of Estate Planners & Councils
- Financial Planning Association
- AICPA Personal Financial Planning Section
- Alabama Planned Giving Council

DID YOU KNOW?

We guided a client through estate planning and the sale of their closely held company stock at $25 million, which **saved them a projected $10 million in estate taxes.**