ESTATE 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 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 planning goals are fulfilled** in the most tax efficient manner possible.

BMSS
CPAs & Business Advisors

(833) CPA-BMSS | www.BMSS.com
AUBURN | BIRMINGHAM | GADSDEN | HUNTSVILLE | OPELIKA

ESTATE 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.

Professional Relationships with BMSS

- 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.**