



**CITRIN COOPERMAN®**  
Accountants and Advisors



TRUST AND ESTATE

## Focused on Your Legacy

You've worked long and hard to build your wealth. Developing an estate plan early is critical if you want to diminish the estate tax burden on your heirs and distribute the highest amount possible to your beneficiaries, with little delay. This is to ensure that your assets are distributed by your choice.

Owners of family-owned or closely-held businesses need to consider the future of their business when doing their estate planning. Avoiding the stressful transition between generations requires careful planning. Citrin Cooperman's Estate and Trust Practice advisors will help you proactively protect your business and wealth, while preparing your business for multi-generational success.

### How Citrin Cooperman Can Help

Citrin Cooperman's dedicated Trust and Estate Practice actively assists attorneys, investment professionals, insurance brokers, and other members of

#### Related Practices

- Commercial Tax Services
- State and Local Tax (SALT)
- International Tax Services
- Private Client Services
- High Net Worth Individuals
- Valuation Advisory Services

our clients' teams to consider the goals and plans that clients have for the disposition of assets during life and beyond. Our experience runs the gamut from small and less complex matters to substantial and highly complex. Our flexibility in the services we offer is a major benefit to our clients.

Our professionals work with closely-held business owners, Fortune 500 executives, trustees, individuals, fiduciaries, beneficiaries, money managers, and entertainment professionals, to name a few. We understand the importance of a cooperative team of advisors, and work closely with them to help make sure our clients' matters are handled professionally and with care. We are also happy to make recommendations and introductions.

### [Related Services](#)

#### Estate, trust and gift planning

- Reviewing wills, trusts, and other estate planning documents
- Foundation and charitable trust advisement
- Business succession planning
- Life insurance planning
- Asset protection planning
- International estate planning
- Multi-generational wealth planning
- Single and multi-family office consulting
- Charitable gift planning

#### Estate and trust administration

- Preparing and filing estate, trust, and gift tax returns
- Assisting fiduciaries and beneficiaries in the probate and administration process
- Post-mortem estate tax planning
- Handling all aspects of estate administration, from marshalling assets to asset distribution

#### Fiduciary accounting for individual and corporate fiduciaries

- Preparation and professional representation of fiduciary accountings for trusts, estates, conservatorships, and guardianships
- Resolving conflicts among fiduciaries and/or beneficiaries in estate and trust administration
- Identifying opportunities for tax savings, preparing tax returns, and working with legal advisors in resolving disputes with creditors and the Internal Revenue Service (IRS)