

CLIENT SERVICES:

Estate Planning

Dear Client:

Estate planning ensures that your wishes occur while you are living or upon your death. This often involves planning to minimize estate taxes and probate costs in order to pass on the greatest amount of gifting to your beneficiaries.

Estate taxation is an extremely complex area, with significant differences between federal and state laws. Our experts have been extensively trained and understand the many techniques and tools that are available to create an estate plan. This type of planning also assures an organized transfer of your assets to your beneficiaries.

We can help you with the following:

- Clearly define your estate planning goals
- Organize and create your estate planning team (experts on law, finance, and taxes) if you need one
- Evaluate and recommend estate planning options.
- Prepare, organize, and review your estate planning documents including current wills, trusts, health care and power of attorney.
- Decrease the problems and expenses associated with probate
- Lessen taxes at time of death.
- Arrange for management of your estate in the event you are incapacitated.
- Draft a working plan for conserving and effectively managing your estate after death.
- Transfer the assets of your estate to heirs the way you want.
- Organize fair and adequate liquidation of estate to cover taxes and other expenses
- Amend your plan as needed

Trusts can be used in a variety of ways and can be created during your lifetime or upon your death. For instance, they are often used to control assets until the beneficiary reaches a certain age. They can also be used to distribute assets to a charity or manage assets for a developmentally disabled individual. Placing property into a trust before death can often avoid a lengthy probate process and the proper use of trusts may reduce your taxable estate.

We work closely with attorneys and other professionals to draft the necessary documents, including your will, powers of attorney and trust documents in accordance with your goals. Upon your death, we assist with compliance matters such as the preparation of federal and state estate and income tax returns, probate reporting and other documents.

Also, for our clients who own businesses, it is never too early to plan for succession of ownership. We will help you identify the options, including tax considerations, and pick the best plan available for you. We will work with your attorney to draft the documents necessary to assure that it will happen your way.

Sincerely yours,

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