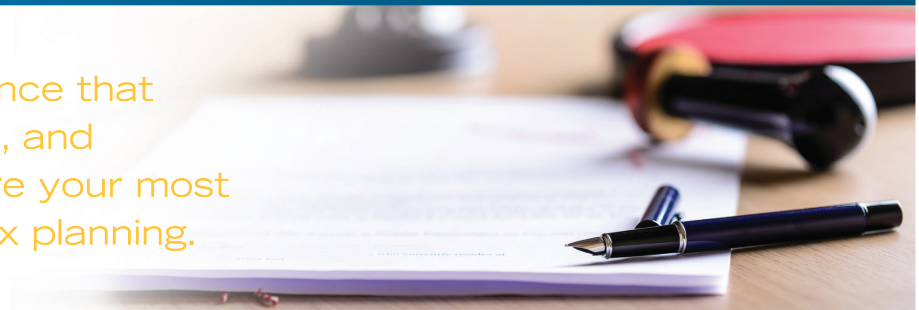
Estate and Trust Tax Planning & Compliance

CPAs & Advisors

CRI provides strategic guidance that is well-informed, tax efficient, and comprehensive to help ensure your most effective estate and trust tax planning.



BENEFIT FROM SERVICES AND SOLUTIONS THAT ARE:

- **Well-Informed.** Estate taxation is one of the most fluid sections of the Tax Code. Estate tax law changes often occur annually and alter dramatically the effectiveness and appropriateness of existing estate plans. Our team is knowledgeable of the ongoing legislative changes and can assist you in proactively addressing your estate to help preserve the maximum wealth for you, your family, or your charity.

- **Tax Efficient.** In addition to planning, CRI offers many services designed to reduce the tax impact of transfer and income taxes – both for estate and other taxes. We deliver expertise related to complex tax reporting elections that are often required to achieve the best possible tax outcomes for both estate and trust income tax reporting and estate and gifting transfer reporting. Additionally, we can advise you regarding the complex issues surrounding generation skipping transfers.

- **Comprehensive.** Fiduciary accounting reports are often required to communicate to beneficiaries the periodic income, disbursements, distributions, and capital changes to assets in an estate or trust. Our team prepares easily understandable financial reports and helps beneficiaries analyze and understand their specific circumstances.

Have you invested a lifetime of work and planning into your family's wealth? Or are you serving as a custodian of your family's years of hard work? In both situations, preservation of the results and prosperity is the foremost priority.

Effective estate planning requires strategic guidance based upon your circumstances, so our professionals provide you with wealth counseling outlining the differences and appropriate uses of various planning tools. Additionally, we collaborate with other estate planning professionals to help ensure your best – and most effective – estate plan.

CRI's professionals prepare thousands of fiduciary income tax and estate and gift tax returns for state and federal taxing authorities.