ESTATE & WEALTH TRANSFER PLANNING

Reducing Estate and Gift Taxes

Our Comprehensive Library of Techniques to Reduce Taxes and Perpetuate Wealth Over Multiple Generations Has Been Assembled, Vetted, Implemented, Refined and Monitored Over our 30 Year History and Includes Workable Practical Solutions that Balance the Tax, People and Business Elements of a Plan.

Family Conflict

Family Conflicts brought Forth by the Estate Settlement Process can be Costly and Significant. Having Advised Hundreds of Families over our 30 Year History, We Provide Pro-Active Solutions and Structure for Minimizing Acrimony.

Charitable Planning

Many plans involve a Charitable Component either through Lifetime Giving or Bequests at Death. Multiple Options exist for the Timing, Delivery and Management of Assets Earmarked for Charity. These include Current Transfers or Deferred Transfers with Income and/or Use Retained for the Lifetime of the Donor or a Stated Period of Time. Our experience includes establishing Private Foundations, Public Charities and the Range of Available Trusts. As Asset Managers, We understand the types of Assets Most Suitable for Fulfilling Charitable Intent and Help Clients Navigate the various Federal and State Regulatory Agencies that Oversee Charitable Entities.

Coordination

We Bring Together the Family, Financial, Legal and Business Elements of a Plan and Allow Clients to Visually Understand the Benefits and Risks of a Planning Technique under Various Growth, Business and Longevity Scenarios. Models, Projections, Flow Charts are Provided to Foster a Clear Understanding Before Documents are Signed.

IRS Acceptance

In many cases our plans have endured for 3 generations and the techniques employed have passed IRS scrutiny through multiple estates. We have the experience to provide peace of mind along with state-of-the-art plans.

Ongoing Administration

Well-constructed plans often fail because of a lack of oversight and administration. SLG provides Fiduciary Reports, Beneficiary Notices, Gift Tax Returns, Generation Skipping Allocation, etc. to assure the desired tax and family bene fits are achieved. This includes direct services as well as coordinating services of our client's other advisors.