



## ESTATE PLANNING



### CAREFUL PLANNING. REDUCED ESTATE TAXES.

Estate planning involves the orderly control and management of your assets, with arrangements for the eventual transfer of those assets to your chosen heirs or selected beneficiaries with the least amount of tax and probate fees. Without an estate plan, you could lose a large share of what you have spent a lifetime building.

### THE BPW APPROACH

BPW's Estate Planning Team coordinates all of your estate planning needs, including:

- Minimizing tax with proper planning and gifting strategies
- Analyzing asset protection needs
- Preparing a liquidity analysis
- Reviewing title of your assets
- Assisting with communication to beneficiaries and family members
- Determining your long-term health care planning needs
- Developing charitable planning techniques

Effective estate planning results in a smooth transition with the least tax burden, providing *ultimate peace of mind*.



### FOR MORE INFORMATION

To talk about your specific estate or trust planning needs, contact Eileen Sheridan, Estate and Trust Planning partner.

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