

# FAMILY WEALTH AND ESTATE PLANNING



**Prepare for the financial future of you and your loved ones with help from Anders.**

Few factors have such a far-reaching impact on every aspect of your life as your finances. That's why our team takes the time needed to create a long-term wealth-building and protection strategy. Working as your sole advisor, or alongside the rest of your current financial team, we strive to provide a comprehensive approach to building and enhancing your wealth.

## WHO WE WORK WITH

We've worked with clients in a broad range of situations, including those who are:

- Corporate executives
- Owners of privately held companies
- Getting ready to sell or have recently sold a business
- Buying a business
- Recipients of inherited wealth
- Recipients of assets earned from compensation programs
- Athletes and entertainers
- Parents and grandparents who want to provide for future generations
- Young entrepreneurs with potential to build wealth

## WHAT WE CAN DO FOR YOU

Whether you are single, have generations you want to protect or are anywhere in between, we'll help you discover what you need to reach your goals. We'll help you maximize taxes, build value and manage your wealth — for today and tomorrow.

- Business Transition Planning
- Charitable Giving Planning Including Private Foundations
- Education Planning
- Estate, Gift and Trust Planning and Preparation
- Executive Services
- Family CFO and Financial Concierge
- Independent Review of Insurance and Investment Strategies
- Personal Financial Statement Preparation and Analysis
- Retirement Planning

## IS YOUR ESTATE PLAN UP TO DATE?

In close collaboration with your other advisors, we'll help you analyze, implement and monitor your estate plan. We can help you:

- Set goals and objectives
- Estimate your net worth
- Protect your current assets and build your wealth
- Determine insurance needs for today and tomorrow
- Plan for appropriate retirement income
- Minimize estate and other tax liabilities
- Monitor and adjust your trust and estate plans
- Preserve wealth for future generations
- Maximize trust, gifting and planned giving benefits
- Avoid the cost, time and public disclosure involved with probate
- Control the distribution of your assets

## EXPERTISE IN ACTION

We've been working with corporate executives, high-net-worth individuals and families for nearly five decades on a wide range of issues. Here are a few of their stories.

### **TRANSFORMED STOCK GIFTS INTO DIVERSE PORTFOLIO**

We worked with a young taxpayer who had been receiving stock gifts over the years from parents and grandparents. Taking advantage of the zero percent tax rate, we knew exactly how much in capital gains to take without incurring any tax. This enabled our client to establish a more diversified portfolio for essentially no cost.

### **CREATED TRUST TO FUND CHARITABLE CONTRIBUTIONS, PROTECT ESTATE**

After inheriting a significant amount of money, our client turned to us to set up a charitable trust. Through the trust, we helped our client make annual charitable donations while removing a significant amount of money from her taxable estate. The trust was funded with low-basis stock, and each year our client sells a portion of these shares to obtain the cash needed for donations. Any capital gains are offset by the trust's charitable deduction.

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**Whether you have already built your wealth or are just starting, Anders can design, implement and manage a plan that will help you meet your goals.**

**TALK WITH AN ADVISOR TODAY.**

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