

TRUST & ESTATE PLANNING

Giving you the tools to fulfill your wishes

Thinking about creating a trust or an estate plan may seem unnecessary for many individuals. However, utilizing trusts in your estate planning can assist with many personal objectives other than tax savings alone. There are several types of trusts with different criteria based on when they are created, whether for the benefit of various individuals upon death, age attainment, for a certain number of years, to provide income either annually, or at the trustee discretion or based on a percentage of assets, among others. The type of trust to establish will depend upon your needs and wants for the trust.

WHY USE A TRUST?

- Protect your assets
- Avoid probate – privacy
- Transfer property via sale or gift
- Provide support after your gone
- Provide for a special needs child
- Donate assets for a charitable purpose now or upon your death
- Reduce taxes
- Ensure you leave a legacy

SERVICES WE OFFER:

- Trust planning
- Estate planning
- Tax compliance
- Estate valuations
- Retirement planning

We at Calvetti Ferguson assist our clients to understand what type of trust or specific planning that best suits their needs or in updating their current estate plan to accommodate any changes. We listen to our clients to ask tailored questions in determining the planning strategies needed to achieve their goals. We can connect with our client's financial advisor and attorney to work as a team in establishing or updating your estate plan.