

Estates and Trusts

**FACT
SHEET**

Bringing significant value in **planning for your future.**

What We Offer

We are a professional services firm dedicated to the success of individuals as well as small businesses. As your trusted advisor, we work with your attorneys and financial planners to craft your estate plan, and then when the time comes, to implement the plan and all of your wishes.

Income tax accounting for estates and trusts is a critical piece of your future plan but this type of accounting generates little interest with lawmakers, and in many cases, the laws are confusing or even plainly outdated. It is imperative that your professional team have extensive, up-to-date knowledge on tax issues related to estates and trusts and can help you with careful, effective planning.



The Value of Our Services for Trusts and Estates

Our team brings significant value to the table in planning for your future:

Up-to-Date Knowledge of the Tax Code—

Many laws regarding estates and trusts are convoluted or outmoded. Our expertise will help you navigate the pitfalls.

Experience That Counts—You'll have confidence in knowing that our team offers years of experience in dealing with estates and trusts.

Get the Most From Your Plan—Our team will work with you and your other professional advisors to assure that your plan offers the greatest benefit to you and your beneficiaries.

Fiduciary Administration—We'll help you manage the details, from financial transactions and monthly accounting to logistical arrangements.



Accounting expertise for **estates and trusts**

Comprehensive Services

Not all accounting firms are equal when it comes to Estate and Trust Accounting. Trust your estate to our professionals and their extensive experience and knowledge.

The professionals of our firm have years of experience in dealing with Estates and Trusts and attend regular continuing education seminars to stay apprised of new laws and tax issues that affect clients. We have experience in Estate and Gift Tax Return Preparation, Estate Planning, Fiduciary Income Tax Return Preparation, and Fiduciary Administration.

We'll review your existing plan or help you develop a new one. Together with you and your other professional advisors, we'll work to assure the greatest benefit to you and your beneficiaries. In addition, we offer Fiduciary Administration services, taking care of all the details from check writing and deposits to monthly management of accounts.

Trust your future plan to the professionals with experience and knowledge. Contact us today.

**Let us help you with a range of services,
from Estate and Gift Tax Return Preparation
to Fiduciary Administration.**

Contact Us Today

For more information on Tax Accounting for Estates and Trusts, or any of our services, please contact our firm. We are happy to discuss how we can help you meet your goals.

541.388.3838 | www.callancpas.com

