Estate Planning & Compliance

Estate planning requires a special sensitivity to the dynamics of your entire life - family, finances, business, lifestyle, and goals. At SEK, we stress the importance of income tax planning as part of comprehensive estate and gift planning. We work with you to identify and clarify your goals, explain projected tax and other consequences, and recommend alternative strategies. Estate planning is not just for the wealthy; anyone who owns a home, car, investments, retirement plan account, collectibles, and more, has an estate.

SERVICES WE PROVIDE

Our estate team is here to serve your estate administration and tax compliance needs. We assist our clients and their attorneys with the preparation of:

- Income tax planning for estates, trusts, and beneficiaries
- Fiduciary income tax returns for estates and trusts
- Estate inventories
- Estate accountings
- Inheritance tax returns
- Estate tax returns - federal and state(s)
- Individual income tax returns of decedents

Whether you are an individual personal representative looking for assistance from start to finish or an attorney or trust department looking to outsource fiduciary and estate tax return preparation, we personally tailor our services to meet your needs. We are committed to the high standards of the accounting profession - integrity, independence, objectivity, and professional competence. We do not sell investments, insurance, or other products. We provide solutions by offering professional service, advice, and peace of mind.

PROFESSIONAL AFFILIATIONS

- Estate Planning Council of Central Pennsylvania, Inc.
- National Association of Estate Planning & Councils

ESTATE PLANNING & COMPLIANCE TEAM LEADER

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