

# Estates, Gifts and Trusts



Planning for your future is an important and responsible process. At Chortek, we understand how hard you work to accumulate wealth and to provide for your loved ones. We also understand that you have goals to live a comfortable retirement, send your children to college, or pass your legacy to the next generation. Whether you have already clearly defined your goals or need guidance to plan for the future, you can trust the team of professionals at Chortek to partner with you to plan for the future you have intended.

The professionals at Chortek provide a broad range of services that are tailored to meet the exact requirements of your goals. Many of the strategies that we offer are listed below:

- Initial planning meeting to discuss your goals and intended outcomes
- Develop and implement your unique plan and involve the services of other professionals, such as lawyers, insurance agents, or securities brokers, as needed
- Utilize trusts, family partnerships, or other tax-advantaged vehicles as part of your plan
- Provide compliance services for the trust and/or partnership to ensure that all of your tax obligations will be met in a timely manner
- Provide estate planning, gift tax planning, multi-generational wealth transfers, preparation of gift, trust, and estate income tax returns along with personal income tax returns, preparation of charitable trust and private foundation tax returns, and assistance with audits as necessary
- Monitor the plan, with routine discussions, to ensure it's working as you had intended

## Qualities of Talented Estate and Trust Accountants

Our clients turn to the talented professionals at Chortek for these reasons:

- Proactively planning to meet the future vision of our clients and their goals
- Understands current tax codes and minimizes tax burden using all applicable deductions

- Has built strong relationships with attorneys, financial planners, brokers and bankers who can be called upon to support your goals
- Knows the effect of state laws on both federal and state trust and estate tax returns
- Coordinates tax returns for individual income tax, trust and estate income tax and estate tax

Chortek is a leading professional services firm with deep industry expertise delivering accounting, auditing and tax compliance services coupled with value-driven technology solutions and tailored M&A offerings.

Chortek advises business leaders and individuals on innovative ways to protect assets and enhance efficiencies through a consistent, client-centric experience.