About Our Firm

At KVLSM LLP, we believe in the value of relationships. We view every client relationship like a partnership and truly believe that our success is a result of your success. Our clients benefit by getting personalized quality service that is beyond comparison. We are committed to providing close, personal attention to every one of our clients.

With years of advanced training, technical experience and financial acumen, our associates take pride in giving you the assurance and the personal assistance that you deserve. Our continual investment of time and resources in continuing education, incorporating state-of-the-art computer technology and nourishing extensive business relationships is indicative of our commitment to excellence.

Committed To Providing
The Highest Quality
Of Client Service

Professional • Responsive • Proactive

KVLSM
Certified Public Accountants and Advisors

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Please visit our Website for the latest firm news, partner profiles, a valuable client tax organizer, financial tools and much more.

KVLSM
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Trust & Estate Group

Peace of Mind

www.kvlsmcpa.com





Services Overview:

Estate, Trust and Gift Tax Preparation — KVLSM's Trust and Estate Group is an important area of practice and resources for our clients' succession planning. We pride our firm and professional staff on effective tax compliance to ensure that the decedent's final income tax returns relating to the estate and trust are prepared in a timely manner. We provide invaluable trust and estate expertise to handle all aspects of fiduciary compliance as well as sophisticated tax advice and representation in the traditional areas of generational wealth transfer planning, gifting and fiduciary tax accounting and tax preparation. It's not about documents, it's about results.

Estate and Trust Consulting — KVLSM's experienced Trust and Estate professionals provide a comprehensive strategic plan with the grantor, executor, fiduciary and family to help them look ahead, consider the unforeseen and protect a lifetime of asset accumulation through succession planning from one generation to another. Our team approach in designing and implementing wealth transfer and succession plans for maximizing gifting, minimizing estate taxes and providing peace of mind for a surviving spouse with income tax planning through the funding trusts from estate assets is the most involved and often the most valuable aspect of our work. We also work with the family's attorney to ensure that the decedent's final wishes are complied with.

Estate and Trust Planning — KVLSM's effective estate planning facilitates the orderly transfer of assets to your beneficiaries, provides security for your surviving spouse and family, and can reduce or eliminate the tax due on the transfer of your business and other assets. For business owners, providing for business continuity and succession of ownership is essential. For help in protecting, strengthening, and transferring wealth and assets from one generation to the next, contact the professionals at the KVLSM Trust and Estate Group today. You will discover why more high–net worth individuals choose KVLSM LLP for assistance with all aspects of their estate and succession planning.

Specific Services:

I. Tax Services

A) Compliance

1. 706 - Estate Tax
2. 1041 - Fiduciary Tax
3. 709 - Gift Tax
4. 1040 - Decedent's Final Individual Income Taxes and/or Beneficiaries
5. Surrogate Judicial Accountings - Formal and Informal
6. State Tax Filing Compliance (as applicable)

B) Tax Examinations

1. 706 - Estate Tax
2. 1041 - Fiduciary Tax
3. 709 - Gift Tax
4. 1040 - Individual Tax
5. State Equivalent

II. Trust & Estate Consulting Services

1. Valuation Services for Estates and Gifting
2. Preparation of estate, trust and gift tax projections
3. Estate Planning Services
    a) Prepare net worth statement
    b) Meet with estate attorney and other professionals
    c) Review potential estate planning and wealth transfer strategies and any related income, estate and gift tax implications
    d) Review wills and trusts to ensure tax and financial objectives are met
4. Assist in estate and trust administration
5. BNY / Mellon Trust Services
6. Post-Mortem Estate Planning
7. Assist with tax research and unusual transactional compliance issues

III. Other Services

1. Prepare estate inventories for Surrogate Court proceedings and probate
2. Prepare reports of date-of-death values and alternate values on estate assets
3. Prepare for testifying in court on estate proceedings and judicial accountings
4. Prepare due diligence reports on previous tax preparation work
5. Prepare amended filings as necessary
6. Ancillary administration filings
7. Assist in reclaiming unclaimed property for beneficiaries
8. Assist in release of liens on estate assets
9. Represent executor and families before federal, state and local agencies
10. Prepare appeals and respond to taxing authorities with tax payment plans
11. Develop strategies to minimize taxation while creating a lasting legacy

"Our Services" means a commitment from the KVLSM team in providing the highest quality service by experienced and knowledgeable professionals.

The KVLSM Trust and Estate professionals... offering peace of mind