SANDERS THALER & ASSOCIATES LLP

Trust and Estate Group

Menu of Services

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MENU OF SERVICES

I. TAX

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 Accountings – Formal and Informal

6) State Compliance (As applicable)

Tax Examinations

1) 706 – Estate Tax

2) 1041 – Fiduciary Tax

3) 709 – Gift Tax

4) 1040 – Individual Tax

5) State Equivalent

Other

1) Prepare estate inventories for Surrogate Court proceedings and probate.

2) Compile date of death values and alternate values on estate assets.

3) Available for testifying in court on estate proceedings and judicial accountings.

4) Due diligence on previous tax preparation work.

5) Prepare amended filings as necessary

6) Ancillary administration.

7) Unclaimed property services.

8) Assist in release of liens.

9) Representation before federal, state and local agencies and appeals for tax payment plans.

II. TRUST & ESTATE CONSULTING SERVICES

1) Estate and gift valuation services available.

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.