



## ESTATE PLANNING & ADMINISTRATION

### Unparalleled Professional Service from a Leader in Estate Administration

The administration of an estate can be an overwhelming and time consuming task. The process involves not only locating and distributing assets among heirs but also preparing various reports and tax returns. KatzAbosch's Estate Administration Group has the technical expertise to lead you through the choppiest waters and steer clear of potential difficulties.

For 40 years, we have been helping personal representatives, attorneys, family members and heirs navigate the estate administration process. We are consistently chosen for our professionalism and comprehensive knowledge in this field. Whether you are handling just a few small assets or administering a large, complex estate, our goal is to make your involvement in estate administration easier and more efficient.

KatzAbosch estate specialists can also assist you in estate planning to minimize taxes and achieve your goals for distribution of your assets. We provide current cost savings and practical advice on available estate planning techniques.

Our specialized services include:

- Accounting and auditing services
- Preparation of compiled, reviewed, or audited financial statements
- Preparation of all practice federal, state, local and personal tax returns
- Postmortem estate, income, and inheritance tax planning
- Preparation of fiduciary income tax returns for the estate and related trusts
- Preparation of decedent's final federal and state income tax

returns

- Estate planning
- Assistance in gathering and valuing assets
- Preparation of inventories and information reports
- Calculation of personal representative and trustee commissions
- Representation before Internal Revenue Service in connection with its examination of the federal estate tax return
- Distribution planning for beneficiaries of retirement plans
- Preparation of court accountings
- Preparation of annual trust accounting
- Assistance with annual tax and beneficiary reporting of charitable trusts
- Gift tax advice and return preparation
- Business succession planning
- Charitable gift planning
- Use of various grantor trusts
- Distribution planning for beneficiaries of retirement plans

In addition, KatzAbosch was a founding firm of the Leading Edge Alliance (LEA), a global alliance of major independently owned accounting and consulting firms in the United States, Asia, and Europe. Since its inception, we have become a leader within the organization by founding various subsets of the group and speaking regularly at LEA conferences.

**For more information, contact us at 1.800.989.6432 or [info@KatzAbosch.com](mailto:info@KatzAbosch.com).**

*The KatzAbosch team is dedicated to providing responsive, accurate and reliable service to clients. We recently conducted an independent client satisfaction survey and across the board, the firm overwhelmingly exceeds our clients' expectations by more than 90%. Additionally, out of 150 accounting firms across the nation, KatzAbosch averaged 5 to 26% higher than the median group. These excellent results showcase the firm's superior reputation in the mid-Atlantic community and beyond as well as our commitment to helping our clients achieve their financial goals.*