ESTATE PLANNING & TAX COMPLIANCE SERVICES

PLAN TODAY. PROTECT TOMORROW.

Planning your estate is one of the most meaningful things you can do for your family and the people you care about most. However, estate planning requires a special sensitivity to the dynamics of your entire life, including your family, finances, business, lifestyle, and personal goals. Estate planning is not just for the wealthy—anyone who owns a home, car, investments, retirement plan account, collectibles, or other assets has an estate.

At SEK, we incorporate income tax planning into comprehensive estate and gift planning. We work with you to identify and clarify your goals, explain potential tax and other consequences, and recommend strategies aligned with your needs.

Our estate planning professionals provide thoughtful guidance and support throughout each step of the process, helping you make informed decisions with confidence and peace of mind.

Estate Planning Solutions

Our experienced team works closely with you and your legal advisors to develop a comprehensive estate plan that minimizes estate and gift taxes, transfers wealth efficiently, and preserves your legacy for future generations.

Estate Tax Planning & Gift Giving

We help high-net-worth individuals and families take advantage of annual gift tax exclusions, lifetime exemptions, and strategic gifting techniques to reduce the size of a taxable estate while transferring wealth to heirs and charitable causes.

Trust Planning & Administration

We advise on the appropriate use of revocable and irrevocable trusts, grantor retained annuity trusts (GRATs), charitable remainder trusts (CRTs), and other structures to achieve your planning objectives.

Estate & Trust Tax Returns

SEK prepares federal and state estate tax returns (Form 706), gift tax returns (Form 709), and fiduciary income tax returns (Form 1041) with accuracy and attention to every detail.

Charitable Giving

For clients who wish to incorporate philanthropy into their estate plans, we provide guidance on charitable remainder trusts, donor-advised funds, and private foundation structures.

TEAM LEADERS

Jodi Blair CPA, CSEP
Member of the Firm
✆ 301.733.5020
✉ jblair@sek.com

YOUR TRUSTED PARTNER IN ESTATE PLANNING

Whether you're an individual personal representative seeking guidance from start to finish or an attorney or trust department looking to outsource fiduciary and estate tax return preparation, our estate planning team customizes our services to meet your specific needs. Our memberships with the National Association of Estate Planners & Councils and Estate Planning Council of Central Pennsylvania, Inc. reflect our commitment to the highest standards of professionalism, integrity, and objectivity.

GUIDANCE FOR ESTATE PLANNING SUCCESS

At SEK, we uphold the highest standards of the accounting profession, providing personalized estate planning services without the pressure of selling investments, insurance, or other products. Contact us to get started today.