TAX ADVISORY AND PREPARATION

When it comes to managing the wealth you've accumulated - executing plans to protect your assets, continuing to grow them, or transferring them to future generations - Beacon Trust provides integrated wealth planning services designed to help address your needs, coordinate your financial strategies, and achieve your goals. Whether your objectives are to maximize the value of your equity compensation, to plan your estate for future generations, to invest money, or to satisfy philanthropic goals, the Beacon Trust tax team can help develop a strategy aimed at successfully carrying out your intent. Beacon Trust's tax service offering includes:

INCOME TAX PLANNING

Evaluate income tax planning strategies:

- Timing of income and deductions
- Analysis of after-tax returns
- Year-end/multi-year tax planning
- Calculate withholding and estimated tax payments
- Prepare income tax returns

WEALTH TRANSFER PLANNING

Review and analyze estate planning techniques:

- Estate plans (wills and trusts)
- Family limited partnerships
- Gifting
- Valuation discounts
- Prepare gift tax returns

CHARITABLE PLANNING

Implement strategies to meet goals on a tax-effective basis:

- Outright gifts
- Qualified charitable distributions from IRAs
- Private foundations/donor advised funds
- Charitable trusts
- Prepare foundation and trust tax returns

INVESTMENT PLANNING

Integrate income tax, wealth transfer, and charitable planning:

- Asset location
- Diversification
- Hedging
- Tax loss harvesting
- Prepare capital gain projections

OTHER INTEGRATED SERVICES

Coordinate with advisors, portfolio managers, attorneys, trustees:

- Provide financial planning and analyses to family members
- Evaluate insurance needs for risk management
- Assist in establishing self-employed retirement plans
- Determine education funding needs
- Cash flow planning

Beacon Trust
INNOVATING WEALTH STRATEGY

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