Estate and Legacy Planning Services

Peak Asset
MANAGEMENT

You may have specific objectives regarding your net worth and how your wealth will pass down to the next generation or to charitable causes important to you. From establishing gifting strategies for your children or grandchildren to designing a targeted charitable gifting plan, Peak can help structure tax efficient and financially prudent plans when it comes to passing wealth along to your desired destination during life and at your death.

With a seasoned estate and trust planning attorney and dedicated tax professionals on staff, Peak can provide the following estate and legacy planning services:

- A full **estate plan review** of your legal documents and balance sheet so you understand how your plan works, and recommendations to optimize it
- An **analysis of capital gains and estate tax exposure** now, and projected at your passing, and the various devices and strategies to mitigate these taxes
- Whether you are seeking asset protection, looking to reduce income or estate tax, or needing assistance in structuring a more organized transfer of wealth, a **review of how various trusts work** and whether trust creation makes sense for your specific set of circumstances
- An **in-depth discussion on philanthropic strategies and vehicles**, such as the use of Qualified Charitable Distributions, Donor Advised Funds, Private Foundations, and Charitable Trusts, and a calculated recommendation based on your overall objectives
- A detailed and thoughtful conversation about **intergenerational wealth transfers**, and how to structure them both during life and at your death. With our professional experience, we are well positioned to conduct family meetings so heirs can understand the purpose behind your legacy plan, and your expectations as you pass wealth on to the next generation
- The **modeling of complex financial, tax and trust planning strategies**, so you can understand through detailed reports and illustrations why certain recommendations make sense for your specific situation
- The management and **“quarterbacking” of relationships with outside attorneys and CPAs**, fostering a synchronization of your financial, tax, estate and legacy planning into one holistic and streamlined process

We simplify the complex at Peak so you can understand how complicated legal documents work, the pros and cons of sophisticated tax and trust planning strategies, and how all techniques will affect your individualized situation. This allows you to make impactful decisions with confidence.

Jason Foster, JD, AEP®, Director of Wealth Strategies & Legacy Planning