Trust and Estate Services

You have goals and objectives for the future, and assets to pass along with your estate. Our trust and estate professionals understand that. That is why our planning and guidance is built around your particular needs. We listen to you, recommend strategies and help you implement a plan for the future.

Estate and trust planning is complex. That's why it helps to have the direction of an experienced CPA to guide you through the many related issues. A CPA offers the advantages of financial knowledge and business affairs, and technical competence in income, gift, and estate tax planning and compliance. The difference at Spire is that our professionals offer these advantages in an integrated environment. Our estate and business succession professionals work closely with our own valuation experts to serve clients with closely-held business or financial interests. This coordination means better quality and more efficient service for you as we work with your attorney and other advisors on your estate plan.

You have worked hard to build your wealth. We will work hard to protect it for future generations.

Our Trust and Estate Services include:

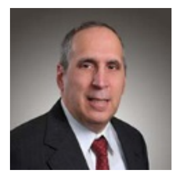
- Estate planning
- Business succession planning
- Estate freeze and discount planning
- Valuation services
- Planned giving programs
- Life insurance analysis
- Retirement planning/IRA distribution
- Tax planning and compliance

Estate Administration:

We regularly work with estate executors and attorneys as they administer estates entrusted to them. During the course of the administration, we will advise you of your obligations, prepare you for upcoming deadlines, and make sure you understand all legal aspects of the administration. You can count on us to gather all information, prepare tax returns and comply with all estate compliance requirements.

Our professionals offer 25 years of experience and hands on expertise in handling the detailed administration of our clients' estates. We will work with your family, heirs and trusted advisors to navigate the myriad of technical compliance issues and to execute your estate plan according to your wishes.

For more information, contact:



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