LEGAL Coordination[1]

Expert advice to **guide** and **protect** your family's path.

Estate Plan Review

Detailed review of your existing Estate Planning documents:

- Summary of existing documents
- Illustrate key points of your Estate Plan in a flowchart and summary
- Ownership, trustee/executor, and beneficiary review
- Estate and gift tax calculations

Trust and Estate Planning

Coordinated support to best position you for:

- Life-changing events, such as business transactions, inheritance, birth of children/grandchildren, marriage, divorce or death
- Wealth transfer, charitable planning, and legacy planning
- Potential tax minimization strategies
- Estate Gift and Generation Skipping Transfer ("GST") tax planning

Review and evaluate your business transactional documents, including:

- Business formation, business sale, investment documents
- Transaction structuring and advisory

Estate Document Drafting[1]

Prepare and/or refresh, then execute your baseline Estate Planning documents:

- Wills
- Revocable Trusts
- Irrevocable Life Insurance Trust
- Powers of Attorney
- Living Will and Advance Medical Directives

Additional advanced Estate Planning documents may include:

- Dynasty Trust, Grantor-Retained Annuity Trust ("GRAT"), Family Limited Partnership or LLC, Private Annuity, Charitable Remainder Trust, Charitable Supporting Organization, Charitable Family Foundation, Charitable Lead Trust, Intentionally Defective Irrevocable Trust (IDIT) Installment Sale, Grantor Retained Income Trust (GRIT)/Qualified Personal Residence Trust (QPRT), Self-Canceling Installment Note (SCIN), Individual Retirement Account (IRA) Legacy Trust

Specialized Consulting[1]

Consulting for special circumstances:

- Special Needs Trust planning for family members with physical, developmental, behavioral/emotional or sensory impairment disorders
- Consulting for same-sex or unmarried couples

[1] Cresset does not provide legal services or advice. Client must engage independent legal counsel to perform legal services.

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