SIGNATUREFD

Financial Design for Life

WEALTH TRANSFER PLANNING SERVICES

Wealth Transfer Planning

LIVE CONFIDENTLY KNOWING THE FUTURE IS SECURE

Your wealth doesn't just represent security, freedom and opportunity for you. It offers that for your family as well. And the time comes when you must look to the future and determine how you want your wealth to impact your family, your community and society as a whole.

At SignatureFD, we provide comprehensive services to ensure that you leave a mark as unique as your signature. We work with you to craft an estate plan that articulates your wishes, protects your family, minimizes your taxes and preserves your legacy for future generations.

LEGACY (ESTATE, GIFT AND TRUST) PLANNING

Your legacy is what survives you. At SignatureFD, as much as financial inheritance is a part of that legacy, we also believe your legacy involves passing on what matters most to you: your wisdom, values, traditions, beliefs and memories. As such, we consider it a great responsibility to ensure that the legacy you leave is the one you intended.

We work with you to analyze your situation, help you clearly define your goals, identify estate planning issues and opportunities, and design a plan with precisely the effect you intend.

We then take service a step further to help you communicate your wishes to all relevant parties and work with your attorney to protect your family through the use of wills, trusts and incapacity documents. We develop tax-efficient strategies to reduce your overall estate tax exposure, introduce sophisticated family and charitable gifting strategies, and consult on tools and techniques that will safeguard assets for future generations.

FAMILY WEALTH COUNSELING

With wealth comes responsibility. And you and your family have to work together to make your plan successful. We work with you and your family to help you articulate your goals and values and then create a mechanism to transfer these to the next generation.

SIGNATUREFD DIFFERENCE

A BALANCED APPROACH

We take the time to understand your motives and what you want to accomplish first and then we use creative and tax advantageous methods to accomplish your prioritized goals.

CLARITY & CONTROL

Estate planning can be intimidating. We help you develop a clear and understandable plan where you remain in control and confident in your decisions.

EXPERIENCE & EXPERTISE

We have an expert team of CPAs and financial planners with deep experience, blending their sophisticated tax knowledge with the human side of estate planning.

LIVING LEGACY

We help you to create a living legacy where you get to experience the joy of seeing how your legacy enhances the lives of the people you care about during your lifetime.

PROACTIVE PROCESS

Legacy planning is an ongoing and dynamic process. Throughout our long-term relationship, we proactively work with you to ensure your plan is up-to-date and properly implemented.

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We coordinate family meetings and provide forums for open communication for all family members. We then help you by educating your beneficiaries about their rights and responsibilities so they can understand the intent of the planning decisions.

STRATEGIC PHILANTHROPY

We work with you to design strategic solutions for the creation and administration of a philanthropic plan to define your charitable legacy. This includes the identification and design of the appropriate structures (private/family foundations, charitable trusts, donor-advised charitable funds, direct cash/stock gifts, etc.) and the most appropriate assets to use to fulfill your goals in a tax-efficient manner.

SPECIAL NEEDS PLANNING

Special needs planning is of vital importance and extremely unique because you are planning for two generations—your lifetime and theirs. Many special needs adults require support for their entire life, which may be long after the parents have passed away.

At SignatureFD, we will work with you to identify and address your concerns, discuss care options, and quantify financial needs. With your attorney's help, we will design and implement the appropriate financial and legal structures to preserve eligibility for government benefits and develop an overall planning strategy to provide for your family member throughout their lifetime.

FAMILY BUSINESS CONSULTING

For most family business owners, your business typically represents the majority of your net worth. But as you know, the majority of family businesses do not survive beyond the first generation because of issues arising from family issues, legal matters and taxes.

At SignatureFD, we offer a comprehensive suite of services, including business continuation planning, business risk management and benefits consulting, geared to help your protect and grow the value of your business for you and your future generations. We consult with you to explore solutions to family and business issues, plan a course of action, and implement plans with your team of advisors.

TRUST ADMINISTRATION

We are there to assist you with the ongoing management of your trust, including the management of trust assets, calculation and distribution of trust income according to the terms of the trust, filing of accountings and administrative support, and coordination of preparation and filing for trust income tax returns.

ESTATE ADMINISTRATION

We help you with the management of your loved one's estate, including the coordination of probate process with your attorney; post-mortem tax planning; asset inventory and management; collection of life insurance proceeds; re-titling of assets; payment of expenses and debts; final settlement of the estate, including distribution of assets to heirs and establishment of trusts; and coordination of preparation and filing for estate and fiduciary income tax returns.

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