



Estate Planning & Compliance

ESTATE PLANNING FOR EVERY STAGE OF LIFE

Estate planning requires a special sensitivity to the dynamics of your entire life – family, finances, business, lifestyle, and goals. At SEK, we stress the importance of income tax planning as part of comprehensive estate and gift planning. We work with you to identify and clarify your goals, explain projected tax and other consequences, and recommend alternative strategies. Estate planning is not just for the wealthy; anyone who owns a home, car, investments, retirement plan account, collectibles, and more, has an estate.

Our experienced estate team is here to handle all your estate administration and tax compliance needs. We assist clients and their attorneys with preparing:

- Income tax planning for estates, trusts, and beneficiaries
- Fiduciary income tax returns for estates and trusts
- Estate inventories
- Estate accountings
- Inheritance tax returns
- Estate tax returns – federal and state(s)
- Individual income tax returns of decedents

YOUR TRUSTED PARTNER IN ESTATE PLANNING

Whether you're an individual personal representative seeking guidance from start to finish or an attorney or trust department looking to outsource fiduciary and estate tax return preparation, we customize our services to meet your specific needs. Our memberships with the National Association of Estate Planners & Councils and Estate Planning Council of Central Pennsylvania, Inc. demonstrate our commitment to the highest standards of professionalism, integrity, and objectivity.

GUIDANCE FOR ESTATE PLANNING SUCCESS

At SEK, we uphold the highest standards of the accounting profession, providing personalized estate planning services without the pressure of selling investments, insurance, or other products. We offer solutions focused on professional service, advice, and delivering peace of mind throughout the estate planning process. Contact us using the form below to get started today.

Visit www.sek.com for more information or to schedule a consultation today!

TEAM LEADERS

Jodi Blair CPA, CSEP

Member of the Firm

☎ 301.733.5020

✉ jblair@sek.com