

Planning ahead can offer greater control and privacy, which is why estate planning is an essential part of an individual's overall financial plan. Although estate planning can be complex, an informed and well-designed plan can help ensure that your assets and loved ones are secure.

Grassi's Trust and Estate Services Group professionals dedicate their time to working with individuals, business owners, trustees, executors, and other related parties with tax planning and consulting services; business succession planning; formal and informal court accountings; and fiduciary tax preparation services.

### We work with our clients to integrate trust and estate strategies in order to:

- Maximize estate value and develop a wealth plan tailored to their unique circumstances
- Protect their assets throughout every stage of their lives
- Ensure tax compliance for them and their decedents
- Assist and guide them throughout the estate administration process, which could be daunting based on the complexity of the estate and applicable law

### Services Include:

- Estate, Gift and Income Tax Planning
- Trust and Estate Administration
- Gifting
- International Estate Planning
- Pre and Post Death Opportunities



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