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Over *20 years*

experience working with individuals
and businesses to preserve wealth
through tax and estate tax planning.



Tax Time...

Estimated Tax Payment Reminder

For those individuals who remit quarterly estimated tax payments, the 2nd quarter estimated tax payment deadline is June 15th. If we may assist you with the filing of your vouchers, please do not hesitate to call.

New Gift and Inheritance Tax Rules

Late in 2010 a new gift and inheritance tax law was enacted. Effective 1/1/2011 through 12/31/2012, the estate tax exemption has been raised to \$5 million. Furthermore, the new law reunifies the estate and gift tax exemption allowing non taxable gifts during these two years of \$5 million not to exceed lifetime giving of \$5 million. This change provides for the most favorable estate tax planning period we have ever seen. Please contact us to discuss how your estate might benefit from planning and/or utilizing this favorable exemption.

WILLS

We speak periodically of the importance of updating your will. Many changes in your life, your family, employment and changes to tax laws all could affect your will and could render your wishes and desires unattainable should an outdated will be in effect. Just a few of the reasons listed might warrant an update to your will.

- Marriage
- Divorce
- New Family Member
- Starting A New Business
- A Move To A New State
- Change In Legislation
- Death of A Family Member
- Estate Tax Planning

Your will should be reviewed periodically even if none of the above have occurred, in order to achieve your wishes. Additionally, to verify that formula clauses, if utilized, still result in desired outcomes.