Accounting For

TRUSTS & ESTATES

Tax Compliance

Our Trust and Estate team are highly experienced in the following tax preparation and compliance ares:

- Federal and state estate tax return preparation (*Form 706*)
- Gift tax return preparation (*Form 709*)
- Fiduciary income tax returns and tax planning (*Form 1041*)
- Judicial and non-judicial fiduciary accountings for estates and trusts

We Understand You

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.

Our experts in estate, trust, and gift taxation bring value to you by offering advice and proactive solutions that address your unique needs. Our professionals will work with you to develop and implement strategies to help achieve your individual and business goals and minimize current and future tax liabilities.

More Than Just Tax & Accounting

- Executor & estate administration support
- Trust administration & distribution guidance
- Post-mortem planning & tax exemption allocation
- Retirement account planning & distribution
- Estate & gift tax minimization strategies
- Business succession planning
- Family & charitable gifting strategies
- Asset protection & trust formation

"If you are dealing with a complicated estate, I would definitely recommend working with Olsen Thielen."

Sarah McEllistrem

Reach Out Any Time

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