OUR SERVICES

TRUSTS AND ESTATES

Providing trust and estate services is a core competency of Marks Paneth & Shron LLP (MP&S). We serve a broad client population and often work closely with our clients' attorneys on these matters. Our practitioners have a comprehensive understanding of trust and estate laws and regulations.

Our team is further distinguished with professionals having an expertise in fiduciary accountings. These specialists have extensive knowledge of the rules, complexities and preparation of all manner of fiduciary accountings; whether for formal judicial submission or informal "receipt and release." This is an invaluable resource for fiduciaries, beneficiaries and attorneys.

Our trust and estate practitioners actively participate in industry conferences, seminars and associations including the Estate Planning Council of New York City, Inc., and the National Association of Estate Planners and Councils. They are members of the New York State Society of Certified Public Accountants, where they serve on the Trust and Estate Administration Committee and the Personal Financial Planning Committee; among others. MP&S trust and estate professionals are also members of the New York State Bar Association, where they serve on the Trust & Estate Administration Committee.

MP&S serves individuals and family groups with a view to maximizing the orderly and tax-efficient transition of family wealth and businesses from generation to generation. Our commitment to delivering outstanding, personalized client service is expressed in the ongoing satisfaction of individuals, their families and their attorneys.

MP&S provides a full spectrum of services to support lifetime and post-mortem trust and estate planning including succession planning, preparation of tax returns and related filings and administration of trusts and estates as well as any associated litigation matters. A high-level overview of our service offerings follows.

Services Offered:

- Lifetime and post-mortem trust, estate and gift planning
- Assistance with charitable planning and the creation of charitable trusts and private foundations
- Advise on the creation and administration of family limited partnerships
- Assistance in the marshalling of assets and related administration
- Preparation of estate tax, gift tax and fiduciary income tax returns and related filings
- Preparation of tax returns for charitable trusts and private foundations
- Preparation of fiduciary accountings, judicial and informal, for trusts, estates and guardianships
- Tax controversy (federal and state tax examinations and appeals)
- Expert witness testimony and related fiduciary litigation support services

Marks Paneth & Shron LLP
Certified Public Accountants & Consultants