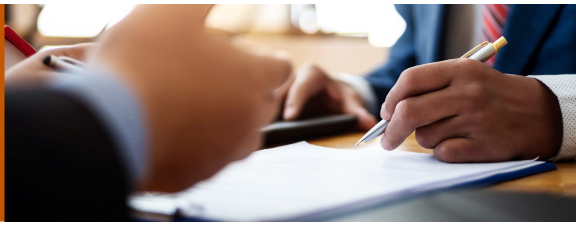
A Tax Team You Can Count On

JANUARY 8, 2025 | BY: THE INDIVIDUAL, TRUSTS & ESTATES TEAM



The Trusts & Estates Tax Team at Johnson O'Connor works daily to help clients achieve their financial goals while maximizing after-tax results. We collaborate with all key parties—clients and their families, attorneys, and investment advisors—to ensure a seamless and transparent process that delivers optimal outcomes.

Our focus extends beyond compliance to include:

- Distribution planning for trusts to minimize income taxes.
- Strategic gifting (to trusts, charities, and individuals) to achieve estate and income tax advantages.
- Estate plan modeling before, during, and after the drafting of wills and trusts to avoid unintended tax consequences.
- Planning for multiple states and jurisdictions, including residency and domicile considerations.

Trusts and estates remain a dynamic area due to evolving legislation and an aging population. Our dedicated team is here to assist you and your clients with personalized, forward-thinking strategies.

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