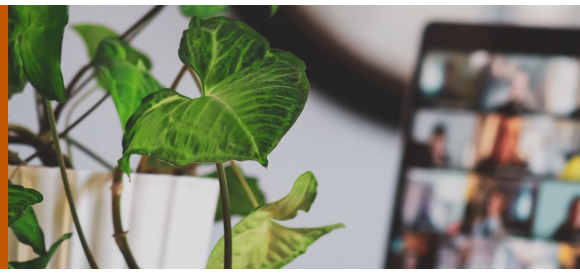
Trusts & Estates Tax Planning: A Collaborative Approach

OCTOBER 8, 2026 | BY: THE INDIVIDUAL, TRUSTS & ESTATES TEAM



Trust and estate planning often involves tax considerations that extend well beyond the preparation of a return. Understanding those implications throughout the planning and administration process can help avoid unintended consequences and support a client's broader financial and estate planning goals.

At Johnson O'Connor, our Trusts & Estates Tax Team regularly collaborates with clients and their professional advisors to evaluate tax considerations as circumstances and planning needs evolve.

Areas We Assist With

- **Trust Distribution Planning –** Considering the income tax implications of distributions from trusts and strategies for trusts and beneficiaries.
- **Estate Plan Modeling –** Modeling potential tax outcomes before, during and after the drafting of wills and trusts to help identify potential tax implications.
- **Gifting Strategies –** Evaluating the tax considerations associated with gifts to individuals, trusts and charitable organizations.
- **Multistate Considerations –** Addressing residency, domicile and other state and jurisdiction-specific tax considerations.
- **Ongoing Tax Planning –** Considering how changes in tax law, financial circumstances or family needs may affect existing planning.

Thoughtful tax planning is one part of a comprehensive trust and estate strategy. Our team is available as a resource when tax questions or considerations arise.

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