



SCHOLL & COMPANY, LLP

CERTIFIED PUBLIC ACCOUNTANTS
ACCOUNTING & CONSULTING

Financial & Estate Planning

Our financial planning services include an evaluation of your present situation, projected future situation, goals and objectives, and assessment of the background environment. We can help you feel in control of your financial future through understanding and financial planning.

We believe that creation and growth of your wealth and protection of your assets requires careful and ongoing financial planning. We always give consideration to your financial planning needs when we prepare your annual tax returns and at other strategic times during the year. We maintain a network of financial professionals who support our personal financial planning program and who provide the utmost in service to you, our client.

With effective estate planning, you facilitate the orderly transfer of assets to your beneficiaries, provide security for your surviving spouse, and potentially reduce or eliminate tax due on the transfer of your business and other assets.

Estate Planning

You may or may not have a will or trust in place, but we can help you take care of all the details, making the process of estate planning as simple and painless as possible. We work with you and your attorney to create a personalized plan that works for you and your financial needs.

Areas we cover include:

- Wealth transfer strategies
- Estate tax planning structure
- Health care powers
- Gift planning to relatives, friends, and charities

If you're a small business owner, providing for business continuity and succession of ownership is essential to maintaining your business's value. We can guide you through the complex process of getting your financial affairs in order.

With estate planning, we take the same comprehensive approach to estate planning that we do with all our accounting and business consulting services.

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