wealth management

REDW Wealth LLC expertise.

estate planning and administration

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Why REDW Wealth?

Our skilled team of CPAs, Personal Financial Specialists and Certified Financial Planners advisors have years of experience with developing and coordinating complex financial situations, preparing gift and estate returns, and acting as conservators, trustees and estate administrators. We will consult with you and your other advisors to understand and coordinate your estate affairs to help achieve your objectives.

Do you know what will happen to your estate? Today's economic environment and complex estate tax laws dictate your estate documents must reflect your wishes. It's vital for you to take the time—now—to inventory your estate, have the difficult discussions about how you want your estate settled or maintained, and take the precautions to ensure your assets will be handled as you want.

HOW REDW WEALTH CAN HELP

Our consultative team approach emphasizes your individual wishes. We will help organize documents and assess the value of your estate. We will work in partnership with the attorney you choose to assure your estate documents are structured efficiently within the complicated estate tax laws and will meet your wishes in the event of your incapacity or death. We will also review your assets to ensure they are properly titled, with beneficiaries properly designated to avoid probate pitfalls and to safeguard proper trust administration. In short, we will ease the confusing burden of administering your estate for those you leave behind.

ESTATE PLANNING CHECKLIST

Ask yourself these questions as you start considering your estate plan:

- Do I have a will, and do I have—or need—a trust?
- Who will manage my assets in my absence?
- Have I titled property and assets so they are consistent with my estate plan?
- Do I have parents or beneficiaries with special needs whom I should plan for?
- Who will care for my children?
- Will my assets be managed in harmony with my wishes?
- How can I use opportunities for wealth transfer (gifting)?
- Is my estate structured to minimize taxes?
- How can I plan so my heirs don't have to liquidate less liquid assets such as the family vacation home or heirlooms to pay estate taxes?
- How can I ensure my life insurance won't be included in my estate?
- Have I addressed succession planning for my business?