



## ESTATE, GIFT AND TRUST PLANNING SERVICES

GreerWalker has a wealth of experience in estate, gift and trust planning. We assist our clients and their advisors to develop and implement integrated estate planning strategies that are customized to meet each client's needs and wishes.

### Why GreerWalker?

Estate, gift and trust planning is more than wealth transfer upon death. Integrated estate planning considers your goals and plans for the disposition of your assets during life and beyond. This may include control over family assets, the succession of the family business, retirement planning, wealth management, and charitable giving. This helps you minimize estate taxes and ensures that your assets are distributed according to your wishes.



# SERVICES

Our experienced professionals will help you find practical strategies for estate planning through:

## 1. Trusts

- Grantor Retained Annuity Trusts
- Life Insurance Trusts
- Special Needs Trusts
- Generation Skipping Transfer Trusts
- Spousal Lifetime Access Trusts
- Qualified Terminal Interest Property Trusts
- Qualified Personal Residence Trusts

## 2. Family Limited Partnerships

## 3. Business Succession Planning

- Buy-Sell Agreement Reviews
- Business Valuations
- Multi-generational Planning

## 4. Planned Charitable Givings

- Contributions of Business Interests
- Donor Advised Funds
- Charitable Trusts
- Private Foundations

## 5. Estate & Fiduciary Tax Compliance

- Estate, Gift and Trust Tax Returns
- Trust Accounting
- Estate and Trust Administration

## GreerWalker LLP

GreerWalker LLP is a CPA firm providing tax, assurance, accounting, and advisory services focused exclusively on the needs of privately held middle market companies, owners and individuals. From our offices in North and South Carolina, we provide specialized expertise across a varied spectrum of industries and market segments for a regional, national and international clientele.

Through our investment banking affiliate, GreerWalker Corporate Finance LLC, we also offer exit planning and merger and acquisition services as well as customized wealth planning via our affiliate GreerWalker Wealth Management LLC.



Contact us to find out how we can assist you:

**Sandi Thorman, CPA**

Partner

sandi.thorman@greerwalker.com

**Charles T. Greer, CPA**

Partner

charles.greer@greerwalker.com

**Charlotte:** The Carillon ▪ 227 West Trade Street, Suite 1100 ▪ Charlotte, NC 28202 ▪ 704.377.0239

**Greenville:** 15 South Main Street ▪ Suite 800 ▪ Greenville, SC 29601 ▪ 864.752.0080

**GreerWalker.com**